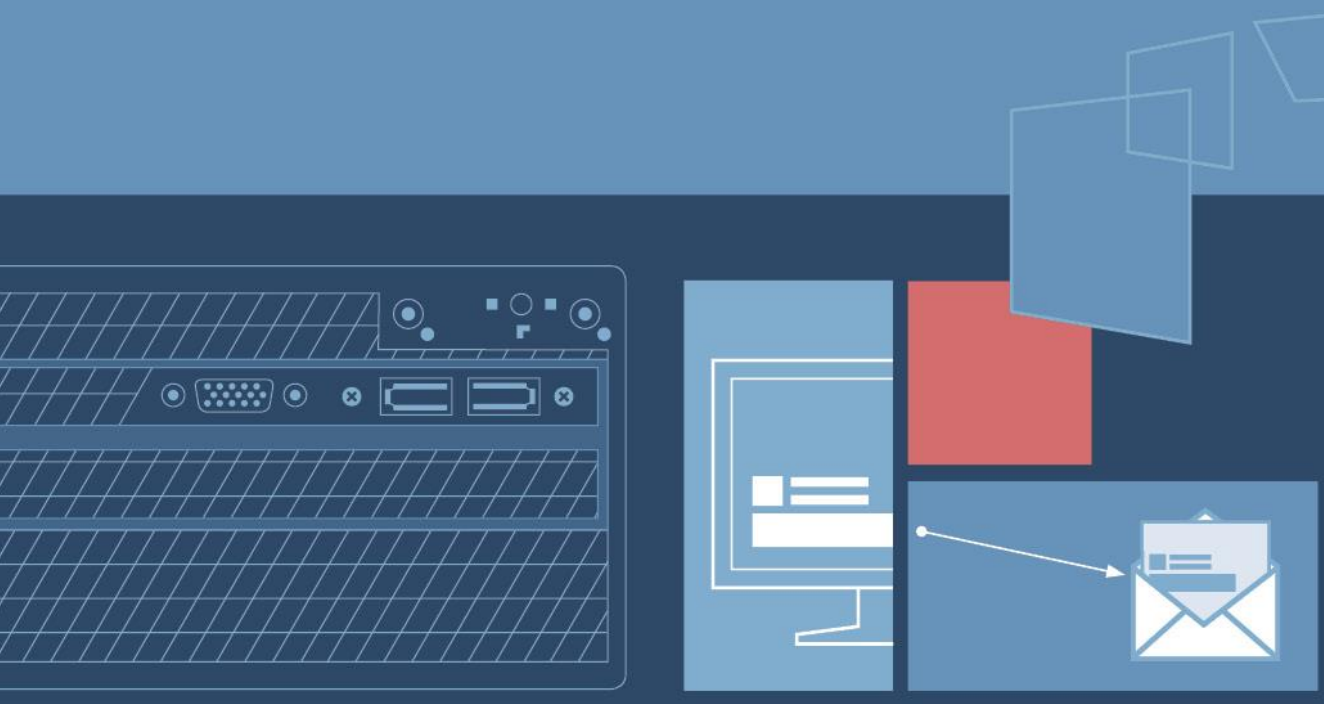
exclaimer™ signature manager
exchange edition

Exclaimer Signature Manager Exchange Edition User Manual



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Chapter 1

Getting Started

Exclaimer Signature Manager Exchange Edition Overview

Exclaimer Signature Manager Exchange Edition allows you to create great looking, professional signatures centrally (including company branding, legal disclaimers and promotional content) and to control the circumstances (i.e. rules) under which these signatures should be applied to email messages that are sent from your organization.

Signature Content

With the ability to create rich, highly creative templates [pg.183] (including tables, images and dynamic Active Directory fields) and to add these before or after original email messages, a signature has the potential to be so much more than just contact details. With Exclaimer Signature Manager Exchange Edition, you can consistently apply personalized signature details, legal disclaimers, corporate branding, banners (e.g. for sales promotions and corporate events) and so much more...the possibilities are immense.

Exclaimer Signature Manager Exchange Edition includes a library of professionally designed templates which can be used 'out of the box', or as a start point for creating your own versions. New templates can be created and existing templates are edited using an intuitive template editor [pg.190], which will be familiar to anyone who has worked with Microsoft Outlook.

Templates are created in HTML, RTF and Plain Text formats to cater for all situations, with an instant preview [pg.184] feature so you can see, at a glance, how your template will be displayed within email messages.

Signature Rules

Having created any number of signature templates, it is likely that you will want to specify criteria (i.e. rules) which must be met to determine which signature should be applied to messages.

At a basic level, this might be as simple as saying 'apply this template to all messages' - but other times you may have more complex requirements. For example, you might choose to apply different signatures according to the sender, or according to the day of the week, or dependent upon the content of the email body and/or subject line...a vast range of scenarios can be achieved using signature policies [pg.64].

A signature policy can be thought of as a set of rules which are specified to control how signatures are applied to email messages. With a range of conditions [pg.90] and exceptions [pg.102] (which can be applied to messages sent and received both internally and externally), you determine if, when and how signatures are applied.

Complete Control

Perhaps one policy isn't enough - perhaps you need to apply (or not apply) certain signatures according to whether or not a previous signature has already been applied. With Exclaimer Signature Manager Exchange Edition, you can create policy chains [pg.114] to define such dependencies.

And there's no need to worry about complicated testing processes, since Exclaimer Signature Manager Exchange Edition includes an intuitive policy tester [pg.162] which will simulate the process of sending and receiving email messages so you can quickly see if policies are defined correctly.

How It Works

Signature templates and associated policies are defined centrally, by an administrator.

When a user sends an email message, the message is checked against all defined signature policies and, if it matches specified criteria for a policy, that policy is applied and associated signature content is added to the message.

All of this happens 'behind the scenes' - the message that is finally received at the other end can be quite different to the one that the user sees when they press 'send'. Depending on how signature policies and templates are defined, the final message might be displayed in a different way, and signature content will be included.

If required, the sent items update [pg.149] feature can be used to store sent messages exactly as they were received (i.e. the processed version), or to store the original version of the message AND the processed version.

System Requirements

System requirements for hardware and software are summarized in the following sections.

Hardware

Item	Minimum Requirements	Recommended Requirements
CPU	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.	x64 architecture-based computer. Intel Itanium family IA64 processor are not supported.
Memory	2GB	4GB
Disk Space	350MB	500MB
Screen Resolution	1024 x 768 pixels	1152 x 864 or higher

Software

Item	Minimum Requirements
Operating Systems	Windows Server 2003 R2 x64 (including all service pack levels). Windows Server 2008 x64 (including all service pack levels). Windows Server 2008 R2 x64 (including all service pack levels). Windows Server 2012. Windows Small Business Server 2008. Windows Small Business Server 2011.
Microsoft .NET Framework	Note: For the Sent Items Update feature, you will require Microsoft .Net Framework 3.5.

System Changes

The installation process makes the following changes to your system.

File Location(s)

As part of the installation process, you are asked to specify a destination folder, into which program files will be installed. The default folder is C:\Program Files\Exclaimer Ltd\Mail Disclaimers

In addition to program files, a number of configuration files are copied to your system. The location of these files is shown below:

Item	File Location
Windows Server 2003 R2 x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 x64 Windows Server 2008 R2 x64 Windows Server 2012 Windows Small Business Server 2008 Windows Small Business Server 2011	\ProgramData\Exclaimer Ltd\Mail Disclaimers

Downloading Signature Manager Exchange Edition

The Exclaimer Signature Manager Exchange Edition installation file is named setup.exe and can be downloaded from the Exclaimer products page:

http://www.exclaimer.com/signature-manager-exchange-edition/download

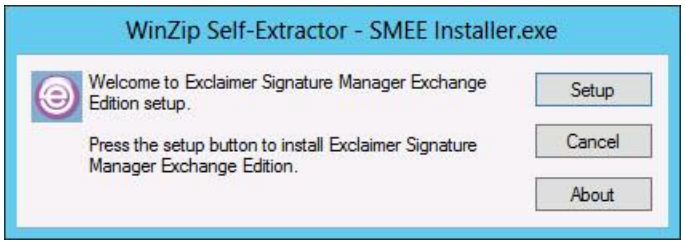
Once downloaded, Setup.exe should be run on the required Microsoft Exchange Servers that meets the system requirements [pg.12] [pg.12].

The Installation Process

The Exclaimer Signature Manager Exchange Edition installation process is comprised of two parts - installation [pg.26] and setup [pg.19]. Both stages are quick and easy to complete, using a familiar 'wizard' approach to guide you through each process, step-by-step.

The installation process includes the Exclaimer license agreement and copies files to your preferred destination folder. Once complete, the setup wizard is launched, so you can configure basic settings for Exclaimer Signature Manager Exchange Edition, which will enable you to get started as soon as the wizard is complete.

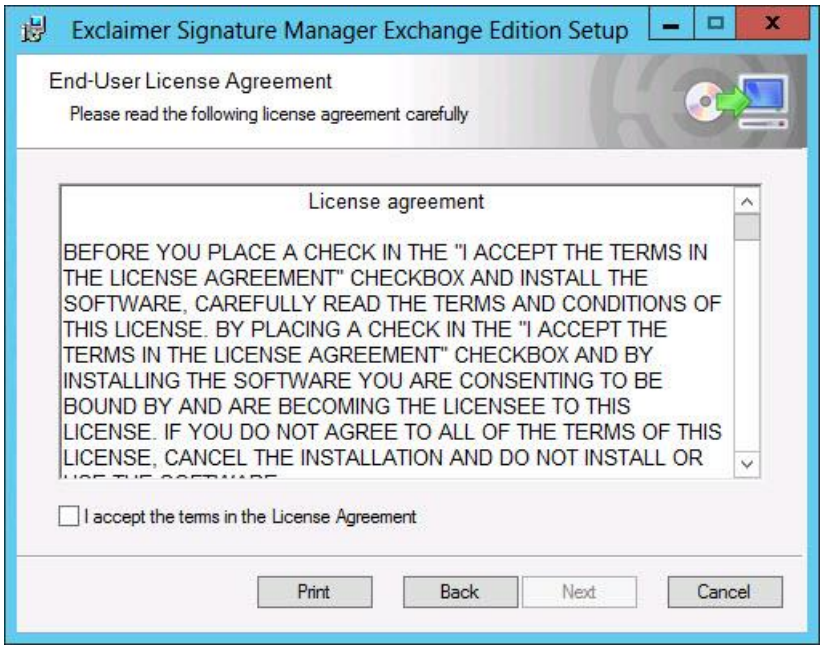
1. Double click the setup file to start the installation and display a welcome message:


WinZip Self-Extractor - SMEE Installer.exe
Welcome to Exclaimer Signature Manager Exchange Edition setup.
Press the setup button to install Exclaimer Signature Manager Exchange Edition.
Setup
Cancel
About

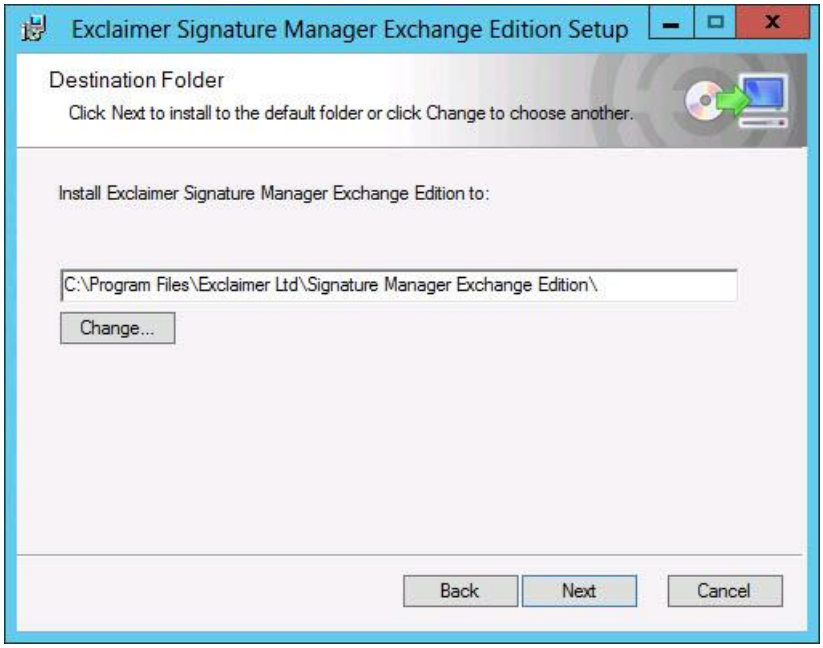
2. Click setup to launch the setup wizard:

Exclaimer Signature Manager Exchange Edition Setup
Welcome to the Exclaimer Signature Manager Exchange Edition Setup Wizard
Please wait while the Setup Wizard prepares to guide you through the installation.
Computing space requirements
exclaimer
Back
Next
Cancel

3. Click next to view the end-user license agreement:

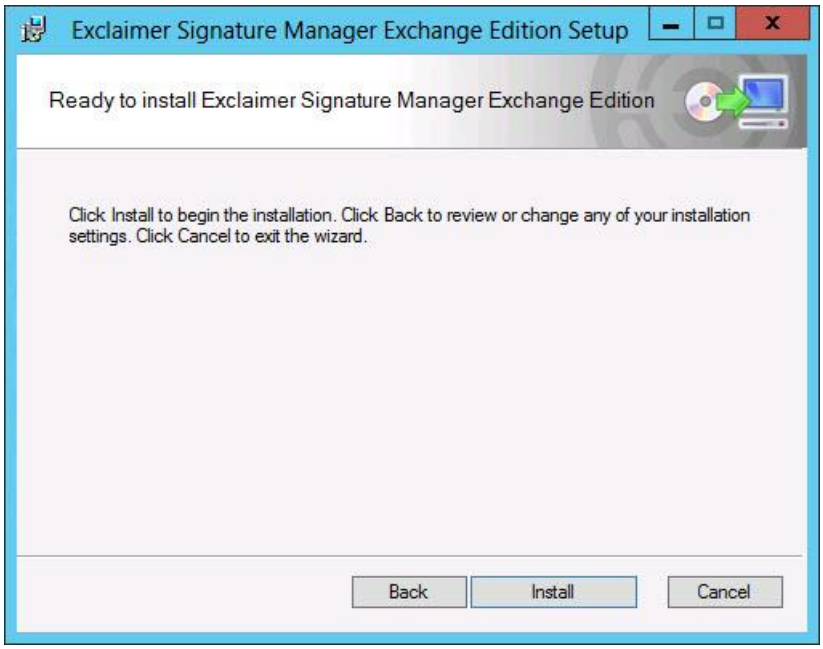

Exclaimer Signature Manager Exchange Edition Setup
End-User License Agreement
Please read the following license agreement carefully
License agreement
BEFORE YOU PLACE A CHECK IN THE "I ACCEPT THE TERMS IN THE LICENSE AGREEMENT" CHECKBOX AND INSTALL THE SOFTWARE, CAREFULLY READ THE TERMS AND CONDITIONS OF THIS LICENSE. BY PLACING A CHECK IN THE "I ACCEPT THE TERMS IN THE LICENSE AGREEMENT" CHECKBOX AND BY INSTALLING THE SOFTWARE YOU ARE CONSENTING TO BE BOUND BY AND ARE BECOMING THE LICENSEE TO THIS LICENSE. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS LICENSE, CANCEL THE INSTALLATION AND DO NOT INSTALL OR
I accept the terms in the License Agreement
Print
Back
Next
Cancel

4. Having read the license agreement, check the I accept the terms in the license agreement box and click next to select a destination folder for installed files:

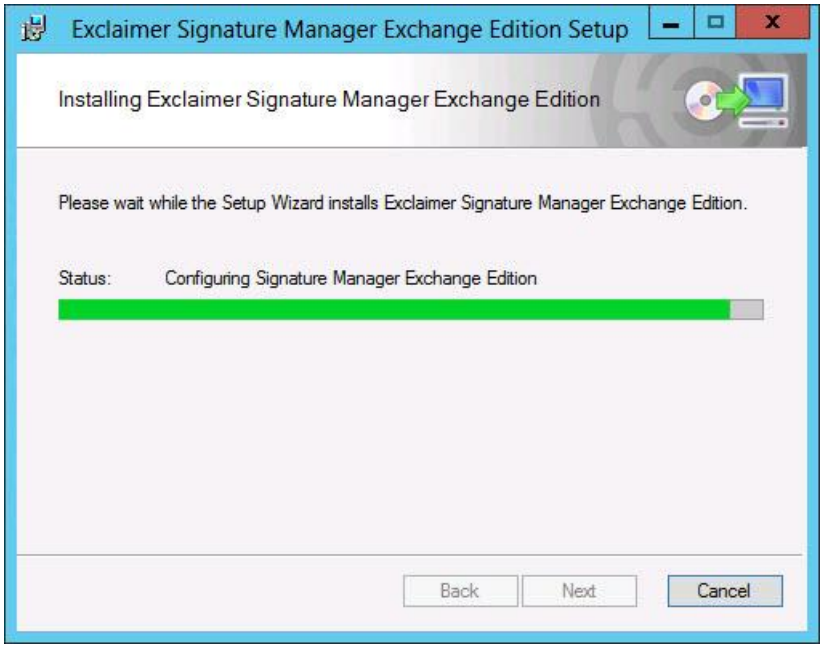

Exclaimer Signature Manager Exchange Edition Setup
Destination Folder
Click Next to install to the default folder or click Change to choose another.
Install Exclaimer Signature Manager Exchange Edition to:
C:\Program Files\Exclaimer Ltd\Signature Manager Exchange Edition\
Change...
Back
Next
Cancel

From here you can accept the default folder, or click change to specify a new location.

5. Click next to confirm the destination folder and prepare the installation:


Exclaimer Signature Manager Exchange Edition Setup
Ready to install Exclaimer Signature Manager Exchange Edition
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.
Back
Install
Cancel

6. Click install to perform the installation:


Exclaimer Signature Manager Exchange Edition Setup
Installing Exclaimer Signature Manager Exchange Edition
Please wait while the Setup Wizard installs Exclaimer Signature Manager Exchange Edition.
Status: Configuring Signature Manager Exchange Edition
Back
Next
Cancel

7. Once files are copied, click finish:

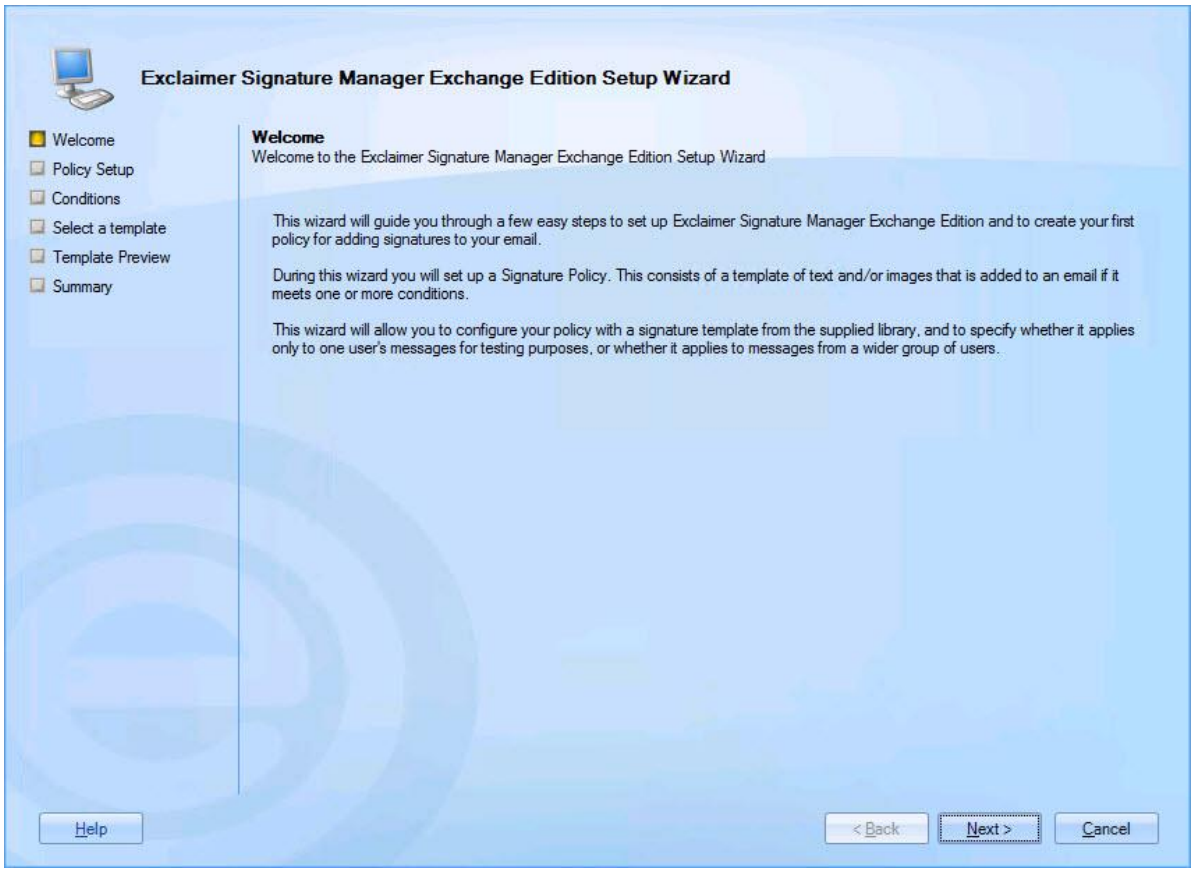
Exclaimer Signature Manager Exchange Edition Setup
Completed the Exclaimer Signature Manager Exchange Edition Setup Wizard
Click the Finish button to exit the Setup Wizard.
Launch Signature Manager Exchange Edition Console
exclaimer
Back
Finish
Cancel

8. The installation is now complete and the setup wizard [pg.19] is launched so you can confirm basic settings and get started with Exclaimer Signature Manager Exchange Edition.

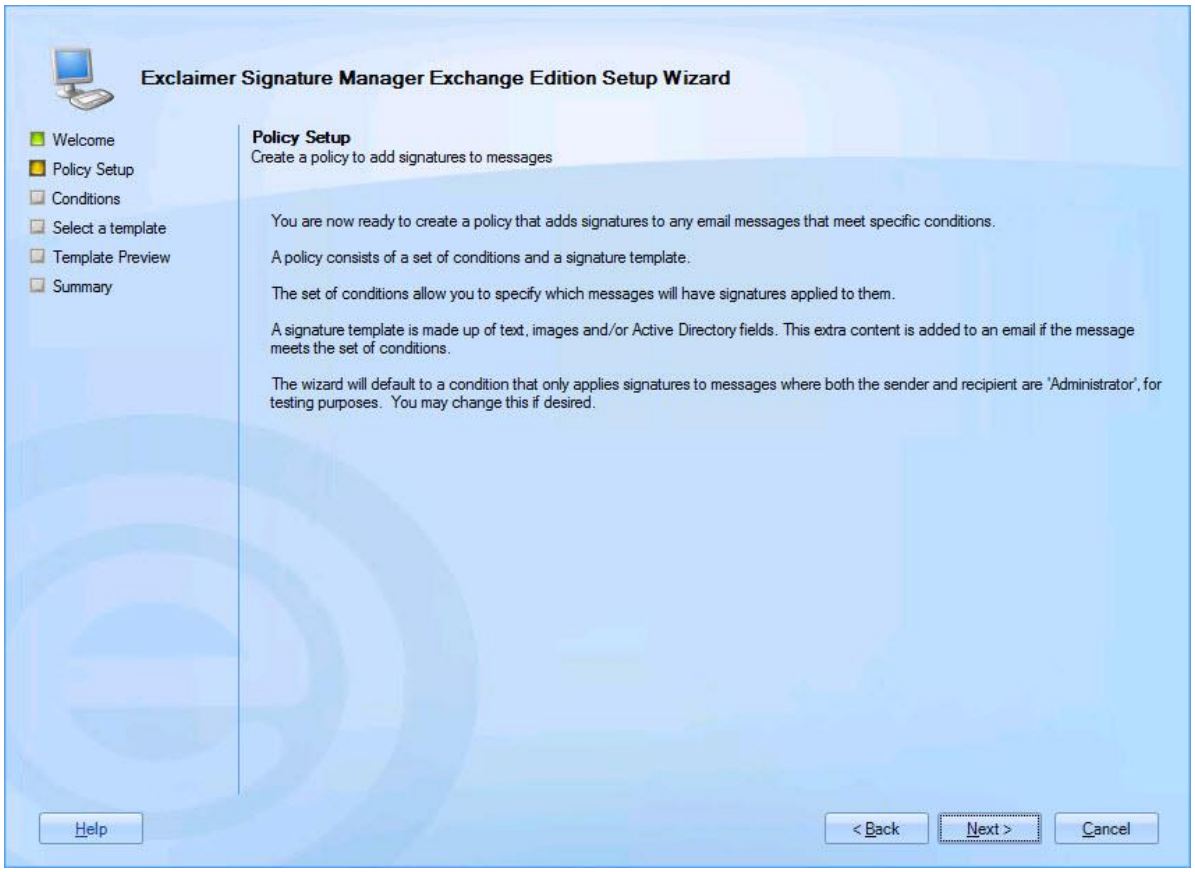
The Setup Wizard

Having installed Exclaimer Signature Manager Exchange Edition, the setup wizard must be completed. This wizard takes you through the basic setup required to get started with the product, as shown below.

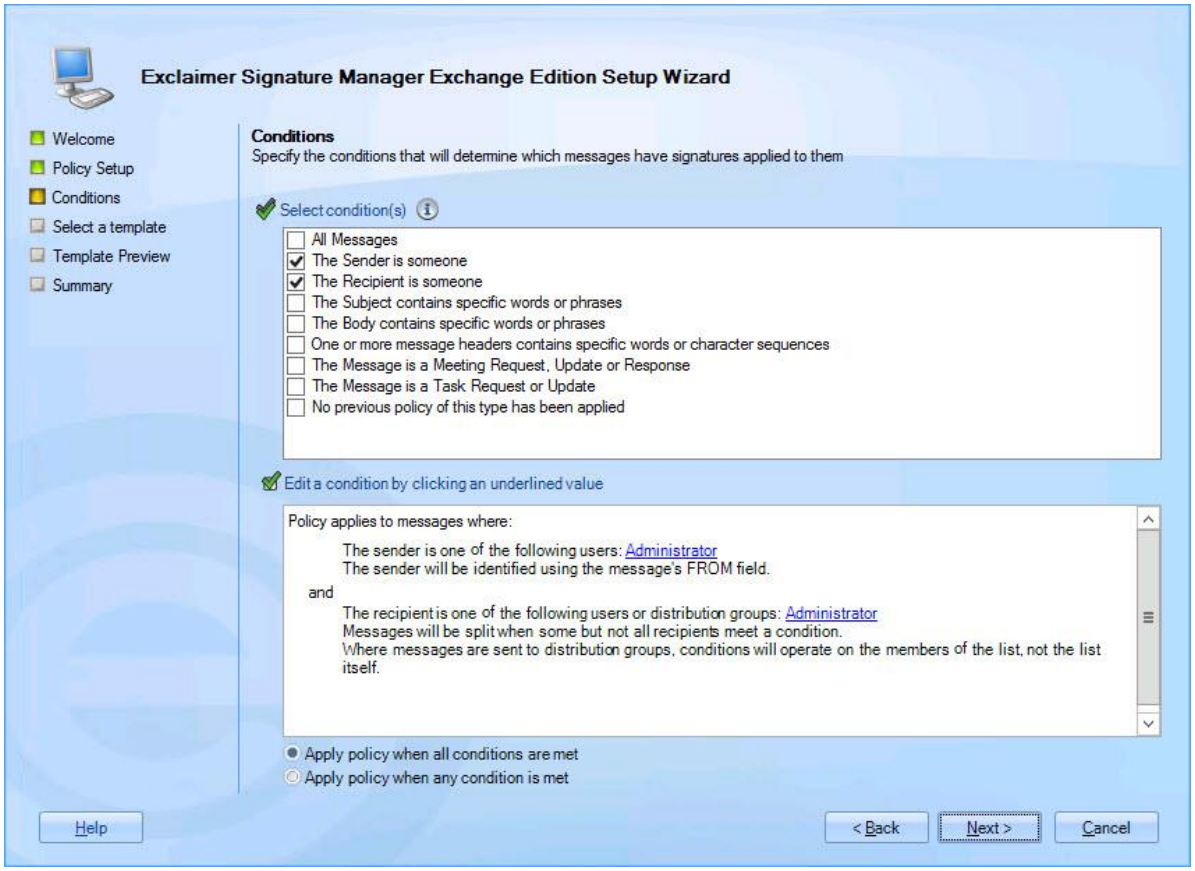
1. The first stage of the setup wizard displays summary information about the process:


Exclaimer Signature Manager Exchange Edition Setup Wizard
Welcome
Policy Setup
Conditions
Select a template
Template Preview
Summary
Welcome
Welcome to the Exclaimer Signature Manager Exchange Edition Setup Wizard
This wizard will guide you through a few easy steps to set up Exclaimer Signature Manager Exchange Edition and to create your first policy for adding signatures to your email.
During this wizard you will set up a Signature Policy. This consists of a template of text and/or images that is added to an email if it meets one or more conditions.
This wizard will allow you to configure your policy with a signature template from the supplied library, and to specify whether it applies only to one user's messages for testing purposes, or whether it applies to messages from a wider group of users.
Help
< Back
Next >
Cancel

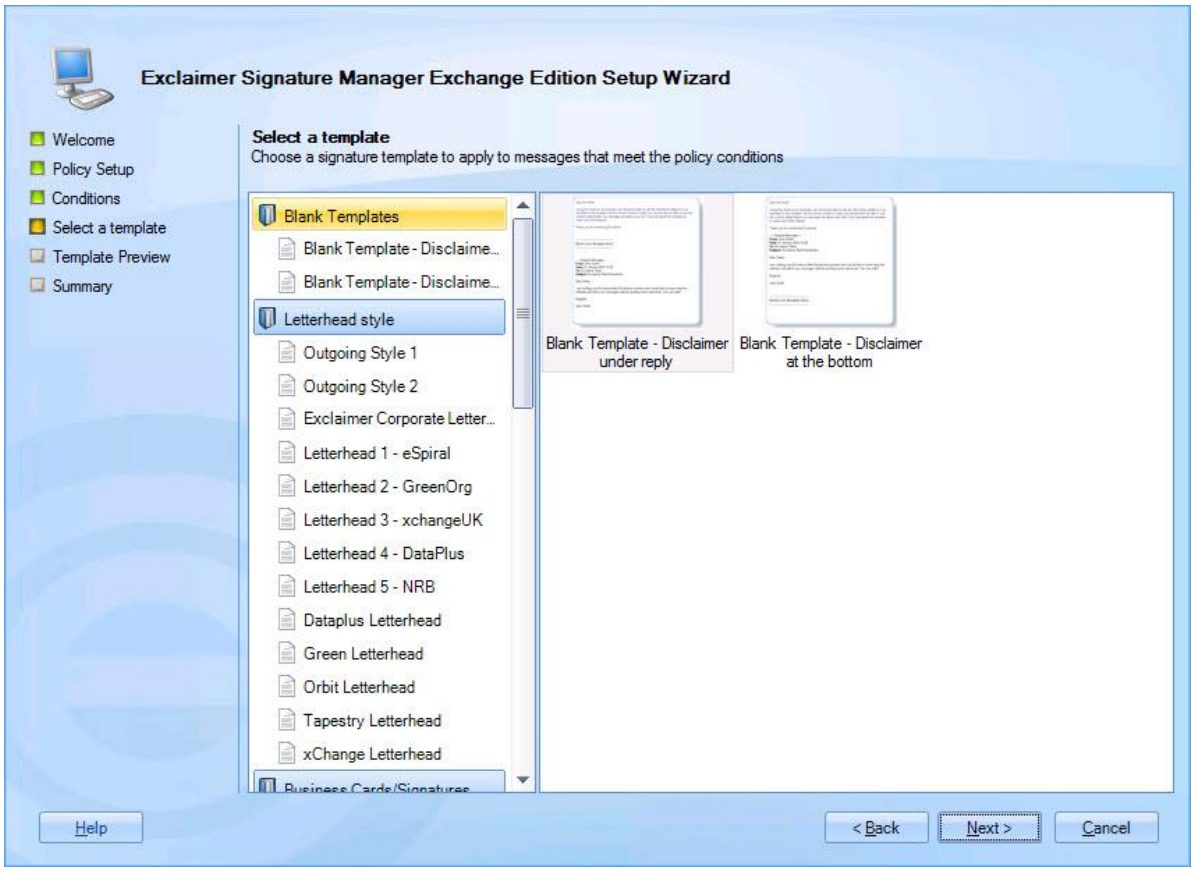
2. Click next to move to the next stage to view an introduction to the policy setup that you are about to complete:


Exclaimer Signature Manager Exchange Edition Setup Wizard
Welcome
Policy Setup
Conditions
Select a template
Template Preview
Summary
Policy Setup
Create a policy to add signatures to messages
You are now ready to create a policy that adds signatures to any email messages that meet specific conditions.
A policy consists of a set of conditions and a signature template.
The set of conditions allow you to specify which messages will have signatures applied to them.
A signature template is made up of text, images and/or Active Directory fields. This extra content is added to an email if the message meets the set of conditions.
The wizard will default to a condition that only applies signatures to messages where both the sender and recipient are 'Administrator', for testing purposes. You may change this if desired.
Help
< Back
Next >
Cancel

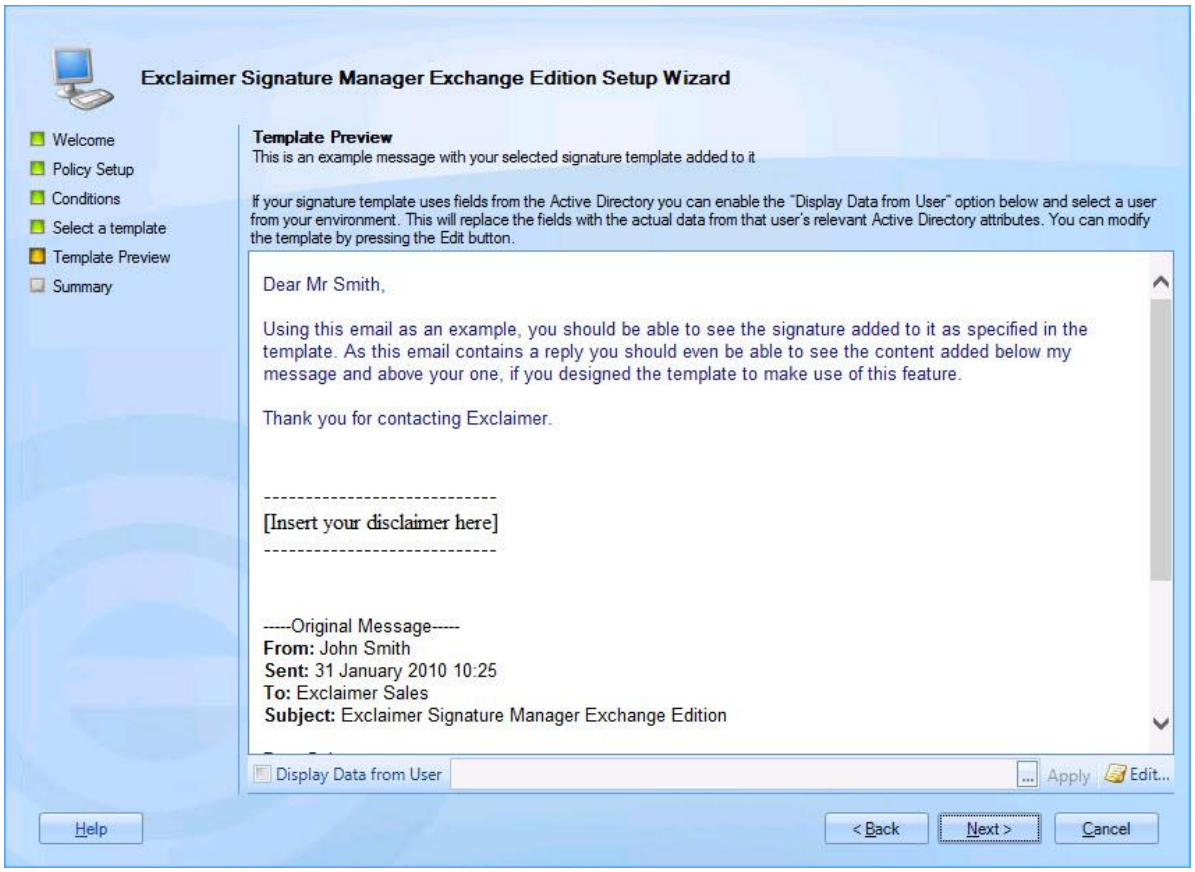
3. Click next to move to the next stage and set conditions [pg.90] for your first signature policy. For testing purposes, default, conditions are set so that the policy will be triggered for any emails where both the sender and the recipient are set to be the currently logged-in user. You can update these conditions now, or at any time after the installation, so if you are not sure what to set at this point, simply accept default conditions and continue:


Exclaimer Signature Manager Exchange Edition Setup Wizard
Welcome
Policy Setup
Conditions
Select a template
Template Preview
Summary
Conditions
Specify the conditions that will determine which messages have signatures applied to them
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Edit a condition by clicking an underlined value
Policy applies to messages where:
The sender is one of the following users: Administrator
The sender will be identified using the message's FROM field.
and
The recipient is one of the following users or distribution groups: Administrator
Messages will be split when some but not all recipients meet a condition.
Where messages are sent to distribution groups, conditions will operate on the members of the list, not the list itself.
Apply policy when all conditions are met
Apply policy when any condition is met
Help
< Back
Next >
Cancel

4. Click next to move to the next stage and select a template [pg.176] to associate with your first policy. A number of standard templates are provided but you can update this template [pg.146] at any time after the installation. If you are not sure what to select at this point, simply accept the default and continue:



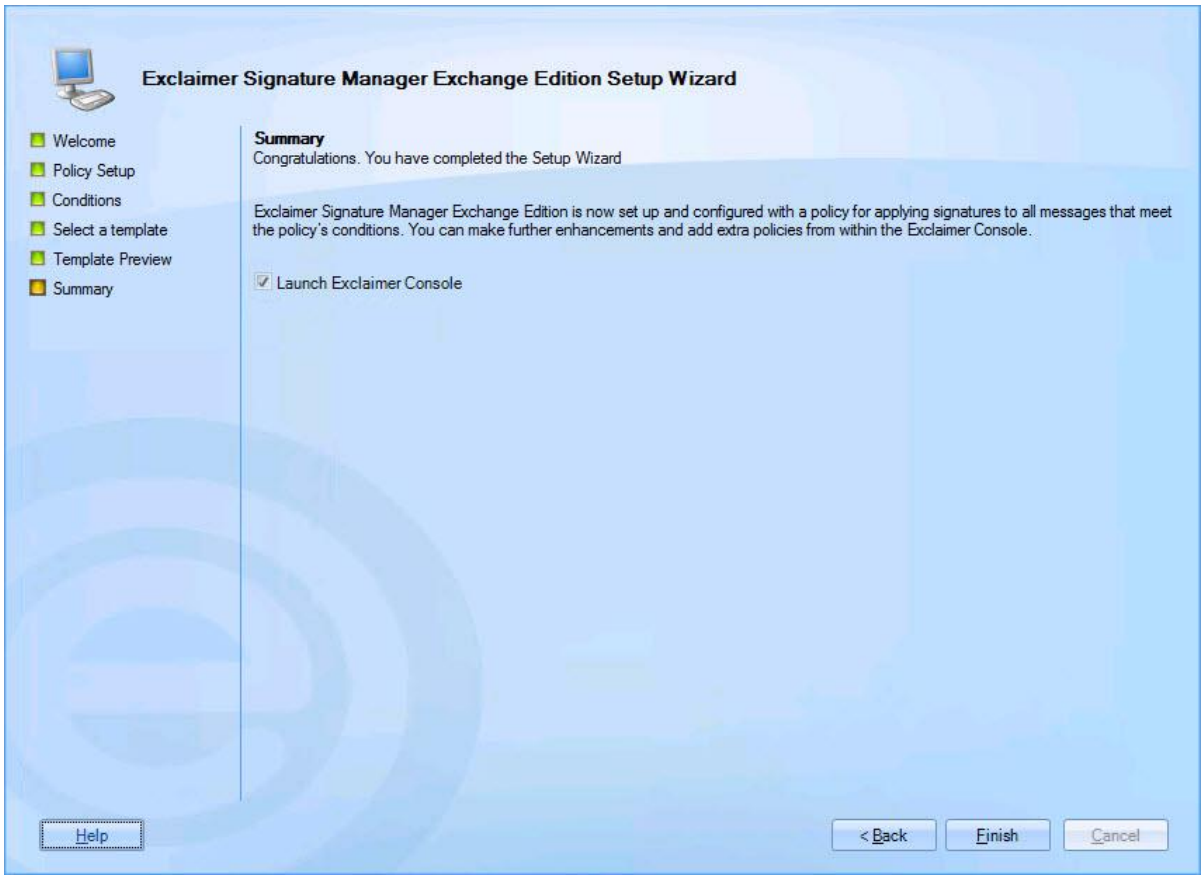
5. Click next to preview the selected template, to see how it would be presented in the context of an email message:


Exclaimer Signature Manager Exchange Edition Setup Wizard
Welcome
Policy Setup
Conditions
Select a template
Template Preview
Summary
Template Preview
This is an example message with your selected signature template added to it
If your signature template uses fields from the Active Directory you can enable the "Display Data from User" option below and select a user from your environment. This will replace the fields with the actual data from that user's relevant Active Directory attributes. You can modify the template by pressing the Edit button.
Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
[Insert your disclaimer here]
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Display Data from User
Apply
Edit...
Help
< Back
Next >
Cancel

If the selected template contains Active Directory fields, the preview might vary depending on which user is associated with the message. If required, you can select a specific user via the display data from user option at the bottom of the preview window.

6. If you wish to edit the selected template, click the edit button to open the template editor [pg.190] and make required changes.

7. Click next to complete the process and start Exclaimer Signature Manager Exchange Edition in the Exclaimer console [pg.31]:


Exclaimer Signature Manager Exchange Edition Setup Wizard
Welcome
Policy Setup
Conditions
Select a template
Template Preview
Summary
Summary
Congratulations. You have completed the Setup Wizard
Exclaimer Signature Manager Exchange Edition is now set up and configured with a policy for applying signatures to all messages that meet the policy's conditions. You can make further enhancements and add extra policies from within the Exclaimer Console.
Launch Exclaimer Console
Help
< Back
Finish
Cancel

NOTE

Having completed the installation process, it is a good idea to check Exclaimer console settings [pg.37]. If you wish to manage multiple servers, you should also check remote deployment options. [pg.40]

Setting Up Multiple Servers

Exclaimer Signature Manager Exchange Edition can be run on multiple servers and managed from a single location. This means that (even on very large systems) you can ensure all of your email systems have the same policies and signature templates installed, so email is processed consistently across the entire organization.

To achieve this, the installation [pg.26] and setup [pg.19] must be run on each physical server and the same remote deployment [pg.40] folder should be specified on each of these. Once Exclaimer Signature Manager Exchange Edition has been installed and remote deployment options have been set, any changes made on one server can be deployed to others (each time configuration changes are saved, you are prompted to deploy them to other configured servers).

Closing Signature Manager Exchange Edition

The Exclaimer Signature Manager Exchange Edition application does not need to be running for policies [pg.64] [pg.64] to be processed. To close Exclaimer Signature Manager Exchange Edition, select exit from the file menu at the top of the Exclaimer console [pg.31] [pg.31].

Chapter 2

Installation & Deployment

Uninstalling Signature Manager Exchange Edition

The uninstall process removes the following items for Exclaimer Signature Manager Exchange Edition:

- Application program files
- The Exclaimer Signature Manager Configuration Service
- The Exclaimer Signature Manager Remote Deployment Service
- The Exclaimer Signature Manager Sent Items Update Service

Configuration files are **not** removed as part of the uninstall process. The location of these files on your system depends upon which operating system is in use, as summarized below:

Item	File Location
Windows Server 2003 R2 x64	\Documents and Settings\All Users\Application Data\Exclaimer Ltd\Mail Disclaimers
Windows Server 2008 x64 Windows Server 2008 R2 x64 Windows Server 2012 Windows Small Business Server 2008 Windows Small Business Server 2011	\ProgramData\Exclaimer Ltd\Mail Disclaimers

Preparation

As a precaution you may wish to export your configuration before running the uninstall process.

The export includes all settings for Exclaimer Signature Manager Exchange Edition. These are written to an econfig file, a proprietary file type for Exclaimer products. To export current settings, follow the steps below:

1. Open the Exclaimer Console.
2. Ensure that Exclaimer is selected in the console tree (i.e. the topmost branch).
3. Select export configuration from the actions pane, or from the action menu. The export configuration window is displayed.
4. Navigate to the required drive and folder, to which the export file should be saved.
5. Specify the required file name for the export file.
6. Click save to complete the export.

Running the Uninstall Process

There are two ways to start the uninstall process for Exclaimer Signature Manager Exchange Edition:

- Activate the original setup.exe and choose the uninstall option; then follow on-screen instructions.
- Use programs and features then follow on-screen instructions.

Chapter 3

The Exclaimer Console

Introduction

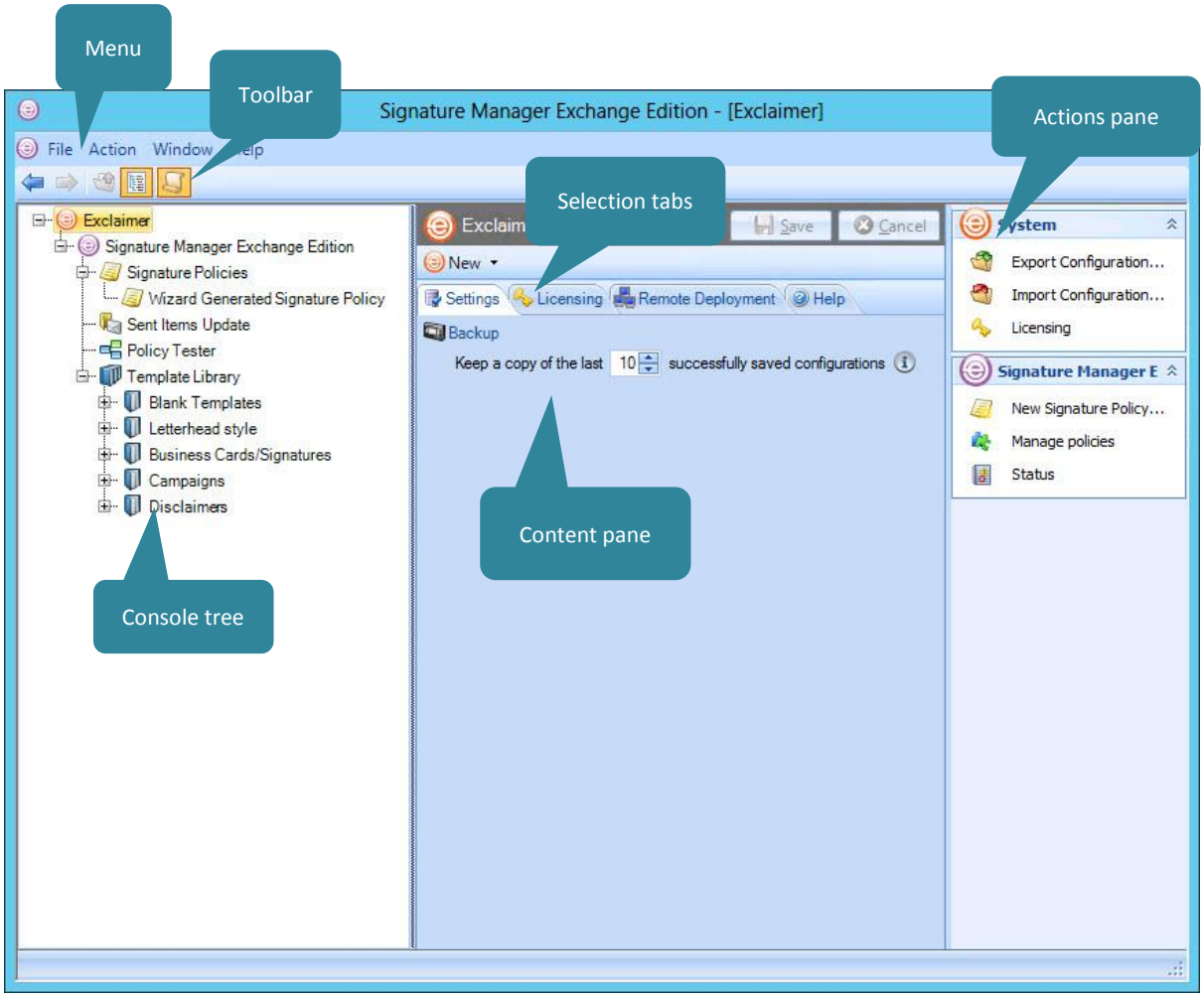
The Exclaimer console can be thought of as the 'control center' for Exclaimer Signature Manager Exchange Edition. From here, you can define general settings which are applicable to the system as a whole, and access each section of the application. This section explains how the Exclaimer console is used, including:

- Understanding the Exclaimer Console window [pg.49]
- Exclaimer console settings [pg.37]
- Exclaimer console licensing [pg.38]
- Remote deployment [pg.40]
- Exporting configuration settings [pg.47]
- Importing configuration settings [pg.48]

If you already know about the console and wish to get started with Exclaimer Signature Manager Exchange Edition, see the Signature Manager Exchange Edition General Settings & Information [pg.51] section of this guide.

Understanding the Exclaimer Console Window

The Exclaimer console window is split into three panes, as shown and summarized below:



Exclaimer Console Summary

Available options in the Exclaimer console are summarized in the following sections:

- Console menu [pg.33]
- Console toolbar [pg.34]
- Console tree [pg.35]
- Content pane [pg.36]
- Selection tabs [pg.36]
- Actions pane [pg.36]

Console Menu

The console menu provides access to key areas and tasks within the Exclaimer Console. Available options are summarized below:

Menu	Summary
File	Save
	Use this option to save any changes made in the current content pane [pg.36].
	Exit
	Use this option to close the console. If any unsaved changes are detected, you are prompted to save before exiting.
Action	New
	Use this option to access the new Signature Manager Exchange Edition policy option and create a new policy [pg.116].
	Export configuration...
	Use this option to export current configuration settings [pg.47] for the console (for example, if you wish to use the same settings to set up another server within your organization).
	Import configuration...
	Use this option to import current configuration settings [pg.48] for the console (for example, if you are setting up a server using the settings from another server within your organization).

.../continued

Menu	Summary
Window	New Window
	Use this option to open another instance of the console - for example, if you need to refer to settings made in one tab whilst updating another. All open windows are listed at the bottom of the window menu, so you can easily switch between sessions. The new window option is also available from the action menu.
	Cascade
	If you have used the new window option to open multiple instances of the console, use this option to display all windows in a 'cascade'.
	Tile Horizontally
	If you have used the new window option to open multiple instances of the console, use this option to display all windows horizontally, across the screen.
Help	Contents
	Use this option to open the help system.
	About
	Use this option to display version information for the console.

Console Toolbar

The console toolbar provides quick access to key tasks. These tasks are also available from the console menu [pg.36], but have been placed on the toolbar for faster access. Options on this toolbar vary, depending on which branch of the console tree [pg.35] is currently selected. Those listed below are available when the top level (Exclaimer) branch is selected:

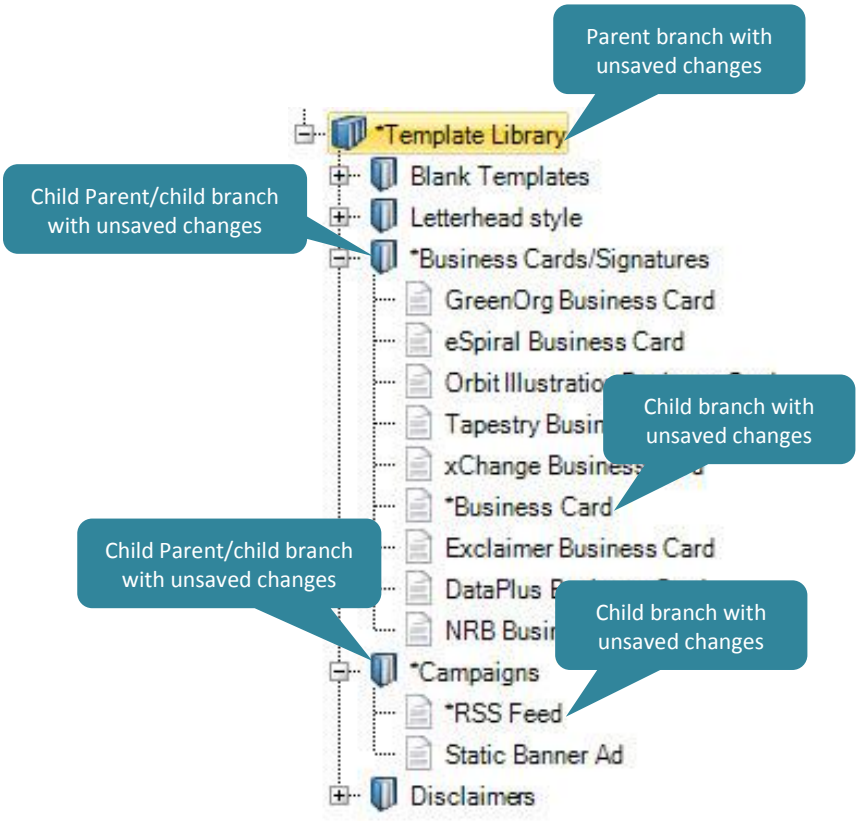
Option	Function	Summary
	Back	Whilst navigating through the console tree, use this option to go back one level.
	Forward	If you are navigating the console tree and used the back button, use this option to go forward again (i.e. to return to the point reached before you went back).
	Up	Whilst navigating through the console tree, use this option to move up to the parent of the current branch.
	Show /Hide Console Tree	Use this toggle option to show the console tree if it is currently hidden, or hide the console tree if it is currently shown.
	Show /Hide Actions Pane	Use this toggle option to show the actions pane if it is currently hidden, or hide the actions pane if it is currently shown.

Console Tree

To navigate the Exclaimer console (and all applications within it), a familiar tree structure is used. The Exclaimer console is always at the topmost level, from which any number of parent / child branches (also known as nodes) are displayed.

Having selected a node from the tree, the content pane displays information and options that are relevant for that node. Options on the toolbar [pg.34] can be used to quickly navigate between branches within the console tree.

When a branch is selected and changes are made but not saved, the branch is displayed with an asterisk (*) symbol; you will see this at parent level (indicating that the branch contains child branches with unsaved changes) and also at child level:



The asterisk symbol is cleared from a branch once its settings have been saved.

NOTE

The **console tree** can be hidden or shown using the **hide / show console tree** button on the toolbar. For quick navigation, use **back**, **forward** and **up** buttons from the toolbar.

Content Pane

Having selected a node in the console tree, any information and settings associated with that node are displayed in the content pane. These settings are accessed using a series of selection tabs [pg.36] at the top of the pane.

Selection Tabs

Information and settings are organized into a series of tabs, accessed from the top of the content pane. Available tabs vary, depending on which branch of the console tree is currently selected. Those shown here are available when the top level (Exclaimer) branch is selected (settings [pg.37], licensing [pg.38] and remote deployment [pg.40]).

Actions Pane

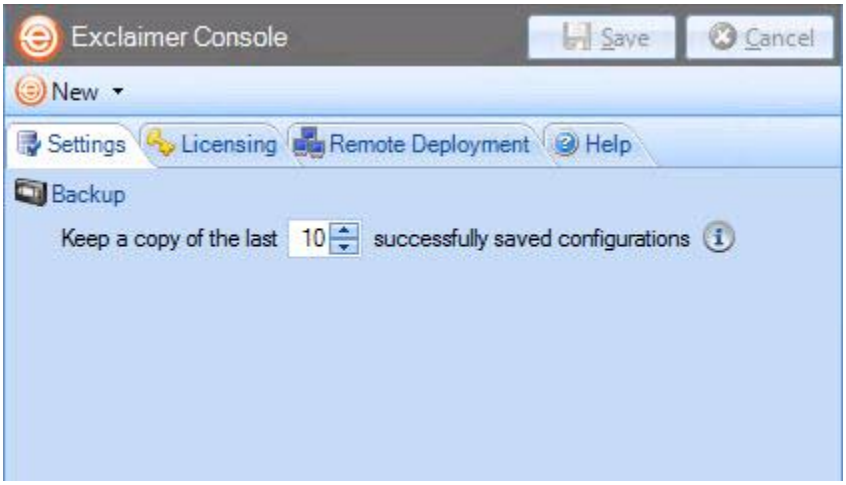
The actions pane displays quick access to common tasks for the selected node. Available actions vary, depending on which branch of the console tree is currently selected.

NOTE

The **actions pane** can be hidden or shown using the hide / show actions pane [pg.34] option on the toolbar.

Exclaimer Console Settings

The settings tab contains options for the Exclaimer console:



Each time that configuration changes are saved, a backup of the previous configuration is created and details of this are stored in the Windows event log. The Keep a copy of the last... option is used to specify the maximum number of backups that will be retained, or set this value to zero if you do not wish such backups to take place.

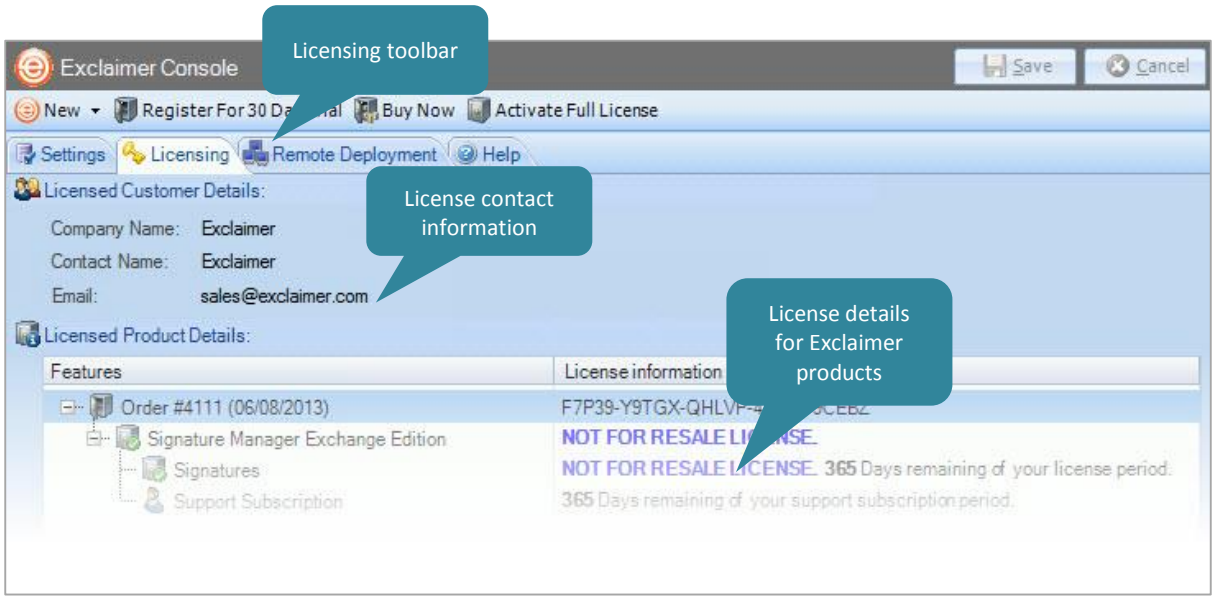
Specific settings [pg.53] for Exclaimer Signature Manager Exchange Edition are available when the Signature Manager Exchange Edition branch is selected in the console tree.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Exclaimer Console Licensing

The licensing tab contains information and options regarding licenses for installed Exclaimer products:



Licensing information is summarized in the following sections:

- The licensing process [pg.39]
- Licensing information [pg.39]
- The licensing toolbar [pg.34]

The Licensing Process

Our aim is to get you working with Exclaimer software as quickly as possible, with minimal restrictions. As such, we have implemented a flexible licensing policy.

If you have installed Exclaimer software for the first time, you can use it for five days without any form of registration. After five days, you are prompted to register for a 30 day trial. Having completed this trial, you can:

- Purchase the product from the Exclaimer website or by contacting the Exclaimer sales team
- Contact the Exclaimer sales team to extend your trial

Licensing Information

The licensing tab shows any contact details associated with this Exclaimer license, together with installed products, features and version information. You can also see the type of license that is currently in place and the license status (for example, the number of days remaining for a trial).

The Licensing Toolbar

When the licensing tab is displayed, the licensing toolbar contains the following options:

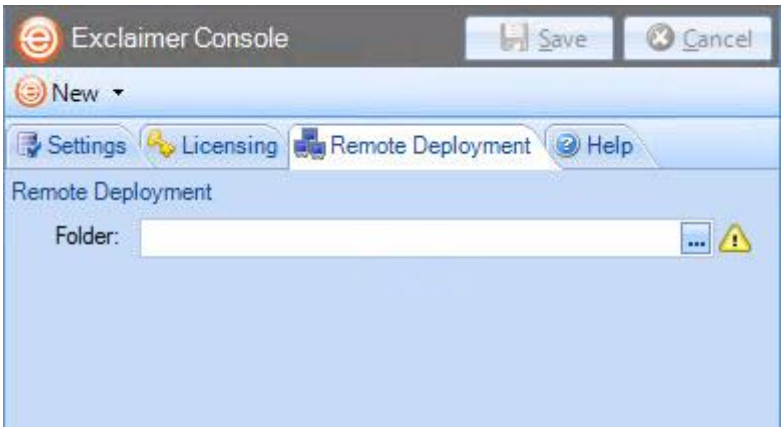
Toolbar Option	Summary
New > Signature policy	See adding a new policy [pg.116] for details.
Register for 30 day trial	Before using this software, you must register your installation of the Exclaimer Console and its associated products. Click this option to open the register for 30 day trial wizard and follow on-screen instructions to register your trial.
Extend trial	This option is only displayed if you have registered for a 30 day trial. To extend a trial, you need to email the Exclaimer sales team.
Activate full license	Having purchased a license, you will receive an email which includes a product activation key. Use the activate full license option to activate your license.
Buy now	Access the Exclaimer website products page (http://www.exclaimer.com) to purchase a license.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the save button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Remote Deployment

If you have multiple Exclaimer installations on your network (for example, you might have servers in different offices around the country), you can manage configuration in a single location and deploy this to all other servers. To do this, use the remote deployment tab to specify a shared location:



Then, whenever you save any changes to the configuration, you are asked to confirm if you would like to deploy them to other servers. If you opt to deploy changes, a file is written to the remote deployment folder and imported by the other installations.

NOTE

Initially, Exclaimer software must be installed on each server - installation cannot be completed via remote deployment. Once installed, specify a **remote deployment** folder to manage subsequent configuration changes with **remote deployment** (each installation must have the same remote **deployment** folder).

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

How It Works

The remote deployment folder is defined using the remote deployment tab within the Exclaimer Console. The specified folder must be a shared folder on the network (only one remote deployment folder should be used on an entire domain). When configuration changes are saved, the computer (on which those changes have been saved) pushes new configuration data to the remote deployment folder.

Remote machines receive notification from the operating system when new configuration data is detected in the shared folder, and they then pull (i.e. import) that data into their local installation. Push and pull operations are completed via the Exclaimer Signature Manager Exchange Edition Remote Deployment service.

The Remote Deployment Folder

Create a shared folder on your network that will be accessible by all machines that are running Exclaimer Signature Manager Exchange Edition.

If you do not want the share to be visible to users, you should use a hidden share. This is done by adding a dollar ($) symbol to the end of the share name. Hidden shares cannot be viewed when browsing the network with Explorer, for example.

Ensure that the user who is logged into the Exclaimer console (that is saving data) has read and write access to this folder.

The following sections detail two methods of applying folder permissions. These are applicable for both the sharing and the NTFS Security permissions of the shared folder - i.e. you must make the same permission changes in both the sharing and security tabs of the folder's properties dialog.

Folder Permissions (Easy Method)

Allow the Everyone group to have Read permissions.

Folder Permissions (Secure Method)

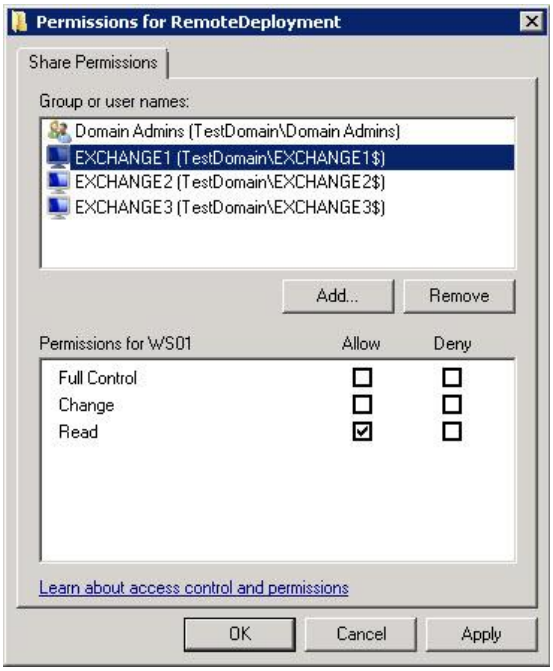
Allow Read permissions only for the computer account of each server with Exclaimer Signature Manager Exchange Edition installed upon it.

This is essential because the Exclaimer Signature Manager Exchange Edition Remote Deployment service runs under the LocalSystem account; this account (as the name suggests) only has access to the local system of the machine that it is running on - not to any network resources.

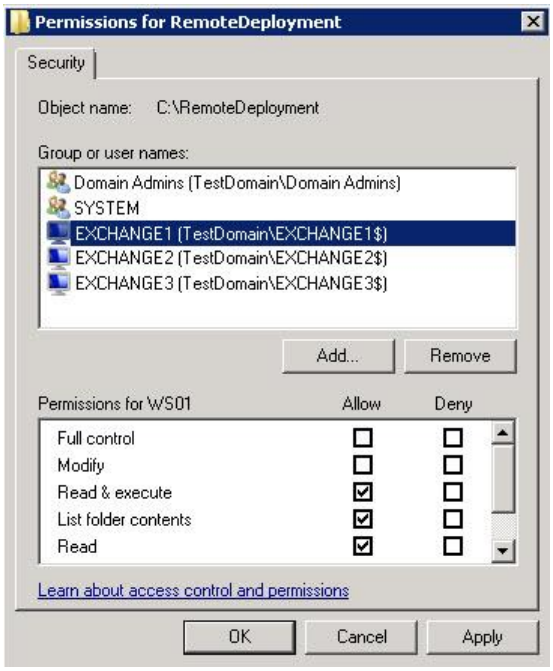
The only way this account can ever see a network resource is when the computer account is given specific access to that resource - i.e. the folder on the network resource allows itself to be accessed by the LocalSystem account of a specific remote machine. In this case, access is restricted to only reading data from the remote deployment folder.

Example permission settings are shown in the following page.

Example permission settings



Share Permissions



Security Permissions

Remote Deployment Timings

As soon as the Exclaimer Signature Manager Exchange Edition Remote Deployment service notices that there has been a change to the remote deployment folder, it starts a timer. Every ten seconds a check is made to see if the file has been written to in the last five seconds. If it has not, the file is added to a queue which will perform the actual import; otherwise the file remains in the timer list.

This means that the import should begin a maximum of ten seconds after the save finishes, though in practice it could be a little more than this depending on server load and how quickly the import thread is given control by the operating system. Similarly, the import could begin sooner, depending on when the save completes relative to the timer interval.

Before checking that configuration changes have been applied successfully on remote machines, sufficient time should be allowed for those machines to actually perform the import (the import can take some time with complex configurations).

Changing an Existing Remote Deployment Folder

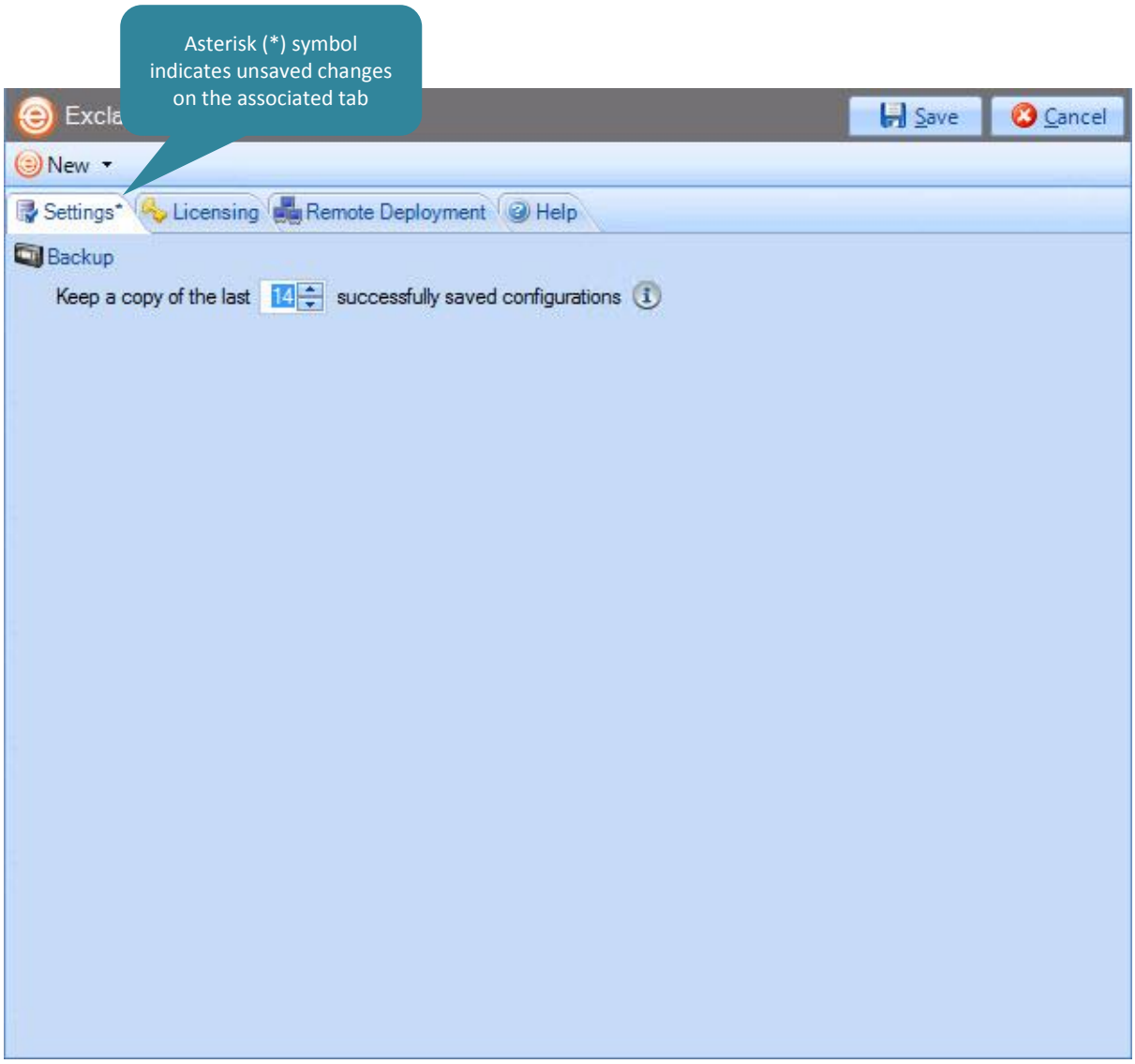
If all Signature Manager Exchange Edition installations are set to point to a specific remote deployment folder and you later decide to change that folder, there is no need to manually change every server to point to the new location.

Having changed the location on one machine and saved the configuration, that machine will write a copy of the configuration data to both the old AND the new locations. Any servers pointing to the old location will import the configuration which includes the new remote deployment folder path so on subsequent deployments, they will pull data from the new location.

As such, you are advised NOT to delete the old remote deployment folder until enough time has elapsed for all remote machines to import the configuration file that contains the new folder location.

Saving Changes in the Exclaimer Console

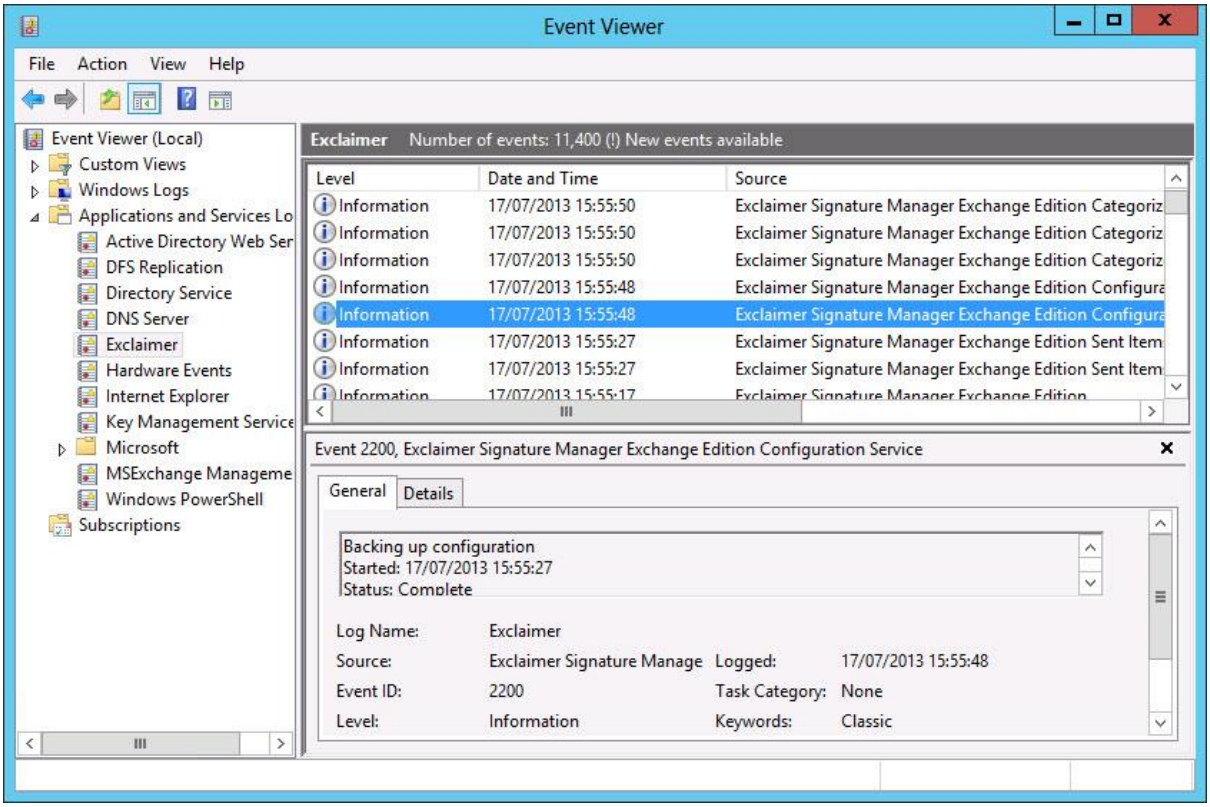
If a tab contains any unsaved changes (irrespective of which branch in the console tree [pg.49] is active), it is displayed with an asterisk (*) symbol - for example:



Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the save button to save changes across all tabs. If you are unsure about any changes that have been made, use the cancel button to abandon all changes.

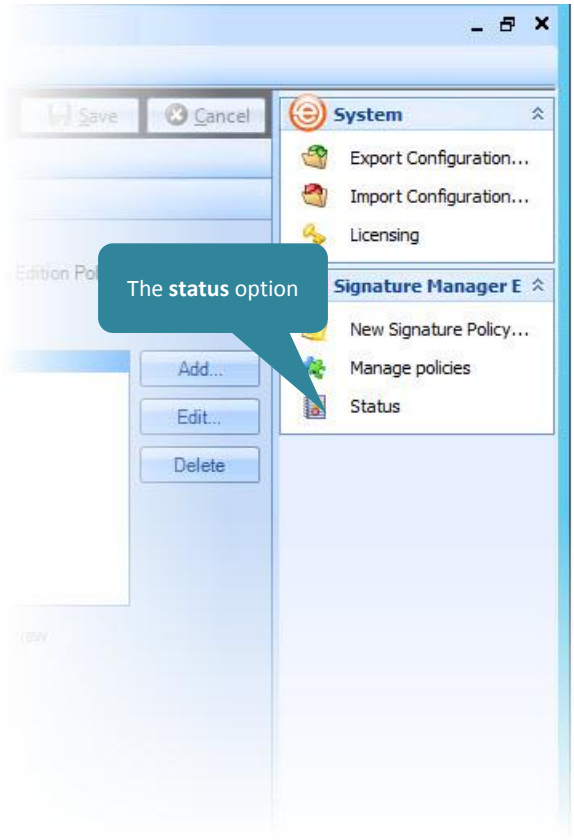
Configuration Backups

Before changes are saved, existing configuration settings are automatically backed up. Details of any backups are written to the Windows event log - for example:


Event Viewer
File Action View Help
Event Viewer (Local)
Custom Views
Windows Logs
Applications and Services Lo
Active Directory Web Ser
DFS Replication
Directory Service
DNS Server
Exclaimer
Hardware Events
Internet Explorer
Key Management Service
Microsoft
MSExchange Manageme
Windows PowerShell
Subscriptions
Exclaimer Number of events: 11,400 (!) New events available
Level Date and Time Source
Information 17/07/2013 15:55:50 Exclaimer Signature Manager Exchange Edition Categoriz
Information 17/07/2013 15:55:50 Exclaimer Signature Manager Exchange Edition Categoriz
Information 17/07/2013 15:55:50 Exclaimer Signature Manager Exchange Edition Categoriz
Information 17/07/2013 15:55:48 Exclaimer Signature Manager Exchange Edition Configura
Information 17/07/2013 15:55:48 Exclaimer Signature Manager Exchange Edition Configura
Information 17/07/2013 15:55:27 Exclaimer Signature Manager Exchange Edition Sent Item
Information 17/07/2013 15:55:27 Exclaimer Signature Manager Exchange Edition Sent Item
Event 2200, Exclaimer Signature Manager Exchange Edition Configuration Service
General Details
Backing up configuration
Started: 17/07/2013 15:55:27
Status: Complete
Log Name: Exclaimer
Source: Exclaimer Signature Manage
Logged: 17/07/2013 15:55:48
Event ID: 2200
Task Category: None
Level: Information
Keywords: Classic

Accessing the Windows Event Log

To access the Windows event log from within the Exclaimer console, simply select the status option from the actions pane:

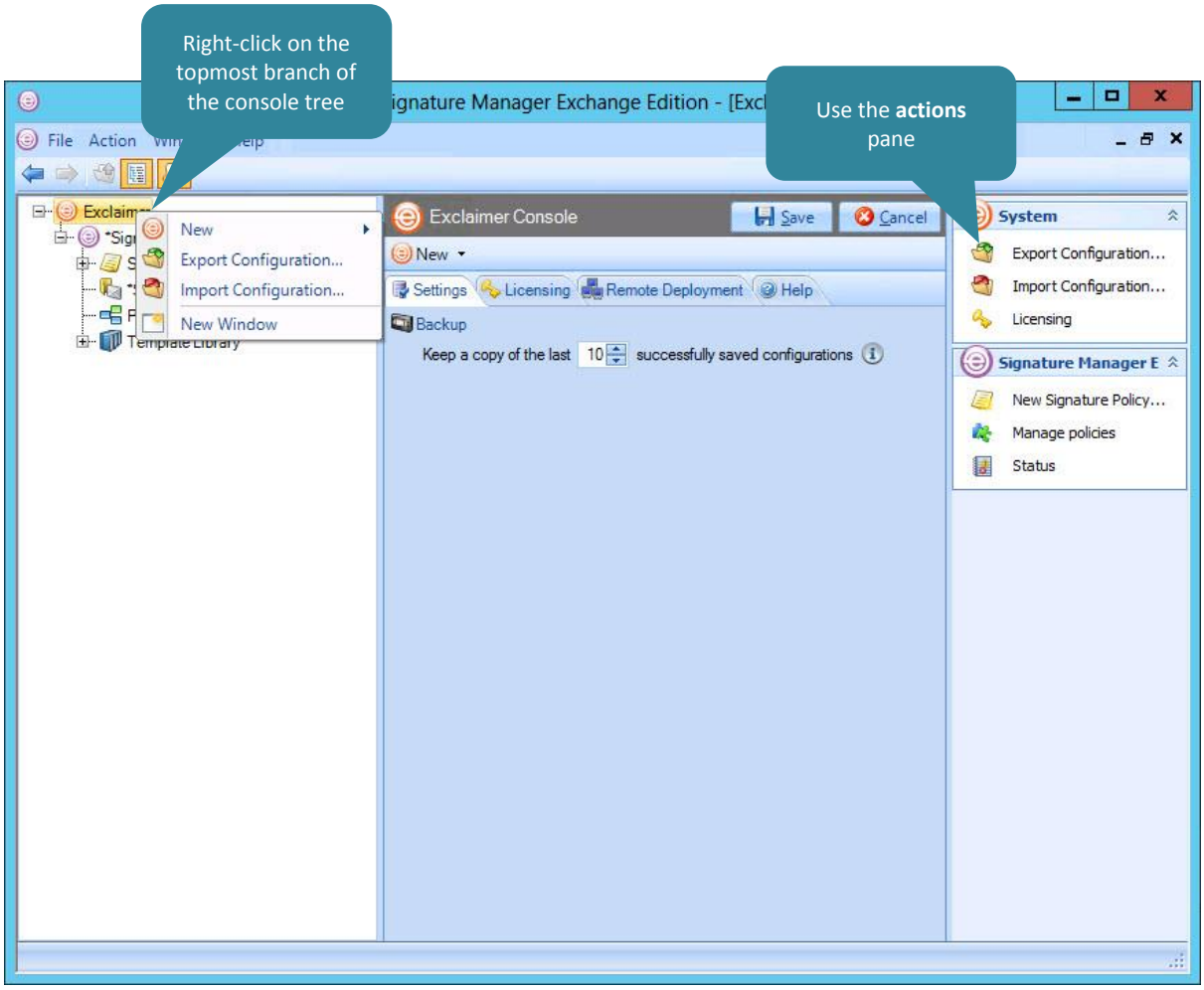


Alternatively, you can access the Windows event log from Windows. To do this, follow the steps below:

1. On the appropriate computer, click Start.
2. Select administrative tools.
3. Select event viewer.

Exporting Configuration Settings

The export configuration option is used to export all settings for the Exclaimer console, together with settings [pg.53], policies [pg.64] and templates [pg.176] for Exclaimer Signature Manager Exchange Edition:

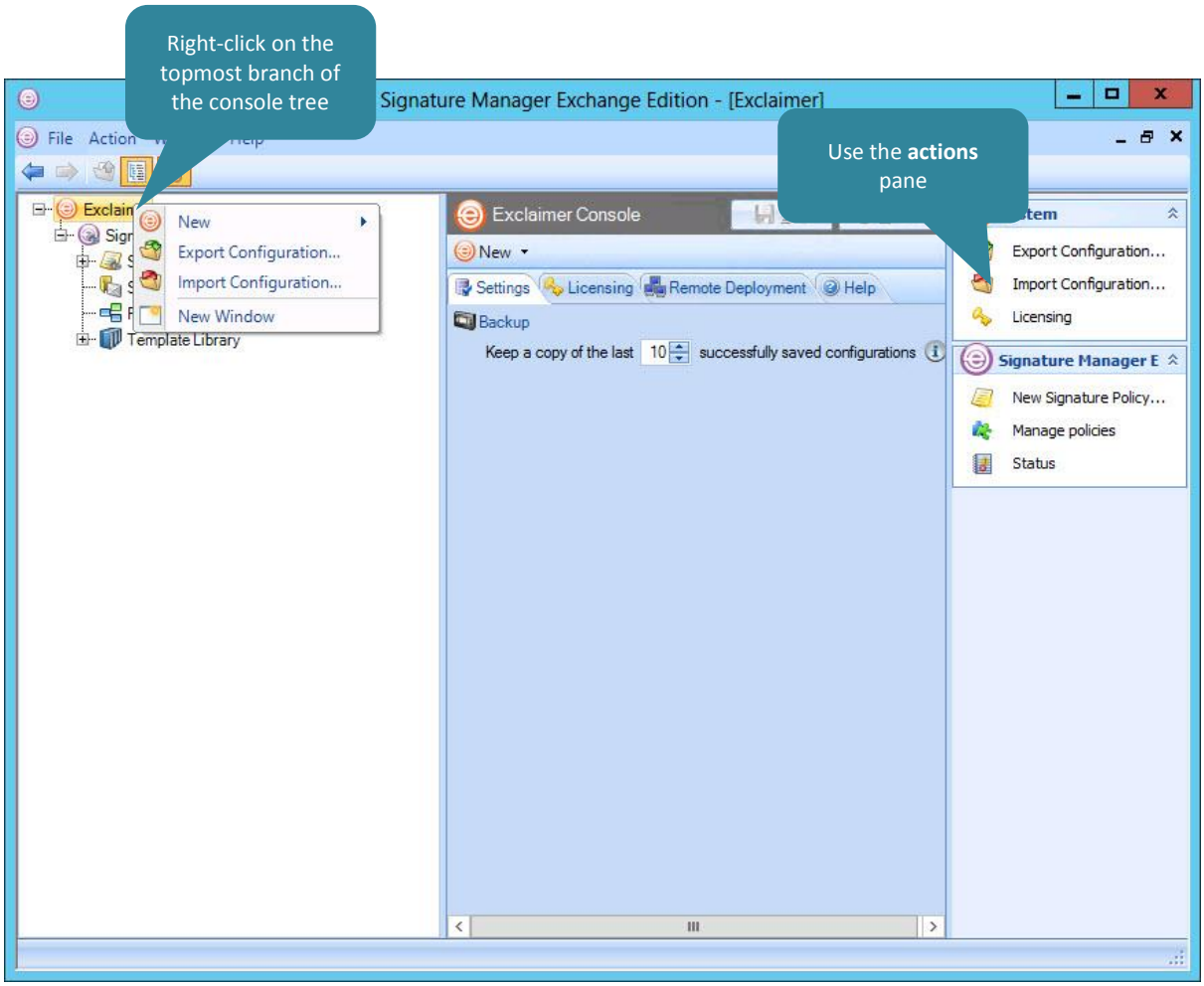


The export process writes all settings to an econfig file; this is a proprietary file type for Exclaimer products and is required if you wish to import settings from a file. To export current settings, follow the steps below:

1. Ensure that Exclaimer is selected in the console tree (i.e. the topmost branch)
2. Select export configuration from the actions pane, or from the action menu. The export configuration window is displayed.
3. Navigate to the required drive and folder, into which the export file should be saved.
4. Enter the required file name for the export file.
5. Click save to complete the export.

Importing Configuration Settings

The import current configuration settings option is used to import all settings for the Exclaimer console, and all Exclaimer applications within it. As such, the import will include all settings [pg.53], policies [pg.64] and templates [pg.176] for Exclaimer Signature Manager Exchange Edition:



NOTE

Remember that **all** settings will be imported, which means that your existing configuration will be overwritten. Before the import takes place, existing configuration settings are automatically backed up; you can find the location of this backup file by checking the Windows event log [pg.45].

Settings must be imported from an econfig file; this is a proprietary file type for Exclaimer products, and is created whenever the export configuration settings [pg.47] option is used. To import configuration settings, follow the steps below:

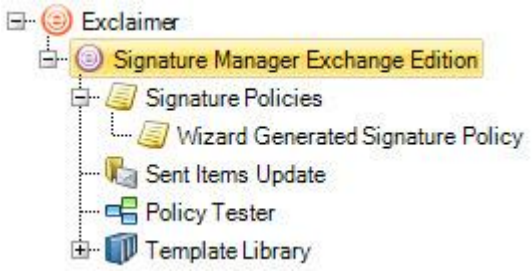
1. Ensure that you have backed up existing settings by exporting the current configuration.
2. Ensure that Exclaimer is selected in the console tree (i.e. the topmost branch).
3. Select import current configuration settings from the actions pane, or from the action menu. The import configuration window is displayed.
4. Navigate drives and folders to select the econfig file to be imported.
5. Click open to complete the import.

Chapter 4

General Settings & Information

Introduction

The Signature Manager Exchange Edition branch (within the Exclaimer console [pg.31] tree) is where all work with signatures is completed:



When the parent branch (Signature Manager Exchange Edition) is selected, settings [pg.52] and information can be viewed and updated. Below this, a number of child branches are used to access the main elements of Exclaimer Signature Manager Exchange Edition:

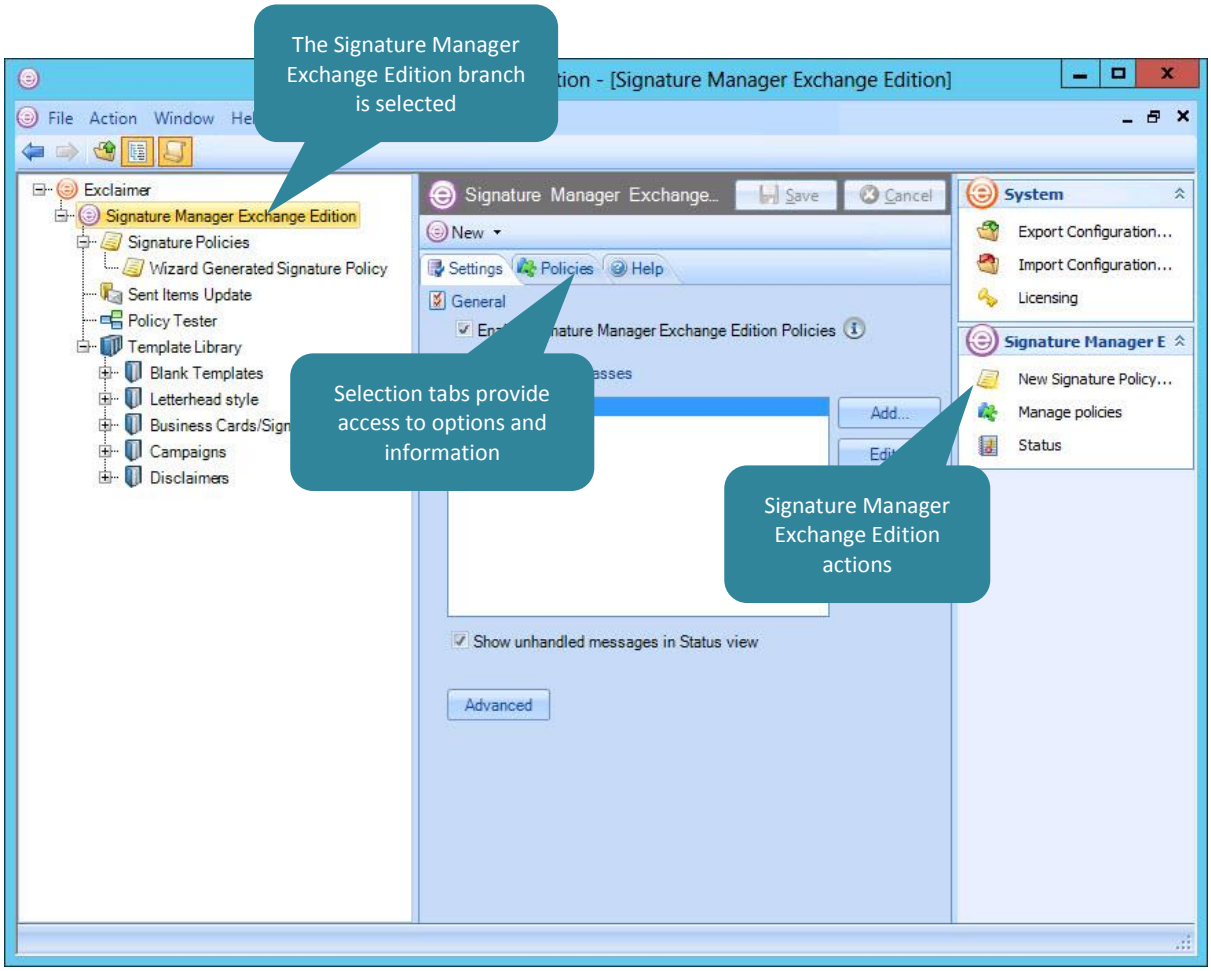
- Signature policies [pg.64]
- Sent items update [pg.149]
- The policy tester [pg.162]
- The template library [pg.176]

As you work with Signature Manager Exchange Edition, you will develop your own strategy for using these options to set up policies and templates, however the basic workflow is summarized below:

Step 1
Create templates which may include email layout & formatting, branding, signatures and disclaimer text
Step 2
Define policies to set conditions under which different templates are used for email messages
Step 3
Test policies to ensure that emails are generated as expected for the given conditions

Accessing General Settings & Information

When the parent branch (Signature Manager Exchange Edition) is selected (within the Exclaimer console [pg.31]), general settings [pg.53] and information can be viewed and updated:



From here, you can:

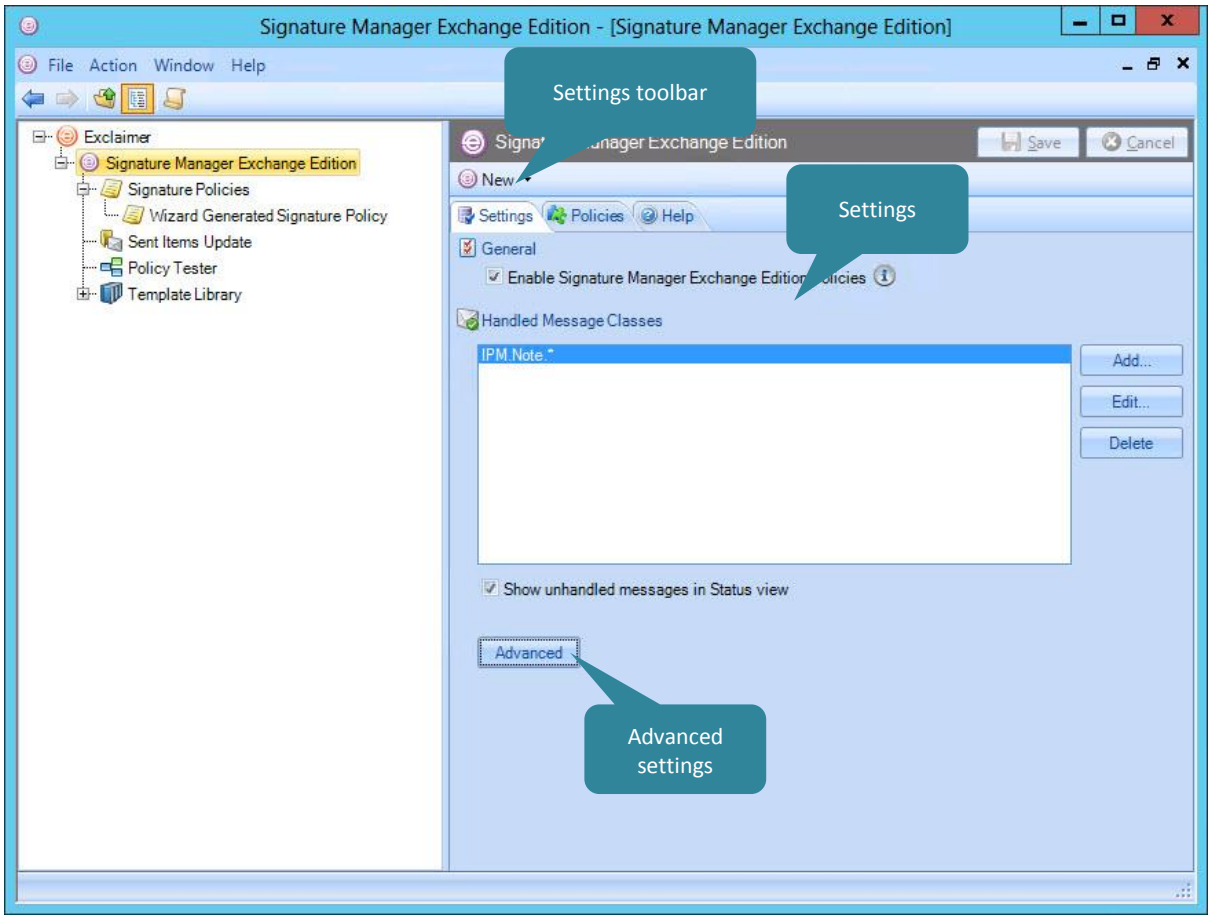
- Navigate the console tree to access signature policies [pg.64], sent items update [pg.149], the policy tester [pg.162] and the template library [pg.176]
- Update general settings [pg.53] for Signature Manager Exchange Edition from the settings tab
- View and manage existing policies [pg.60] from the policies tab (or via the actions pane)
- Add a new signature policy [pg.116] via the actions pane

NOTE

For further information about the Exclaimer console (including the menu, toolbar and actions pane), see understanding the Exclaimer console window [pg.36].

Signature Manager Exchange Edition Settings

The settings tab contains general settings for Exclaimer Signature Manager Exchange Edition:



Available options are summarized in the following sections:

- Available settings [pg.54]
- Advanced settings [pg.55]
- The settings toolbar [pg.59]

Available Settings

Fields on this tab are summarized below:

Option	Summary
Enable Signature Manager Exchange Edition Policies	Enable or disable all signature policies. If this option is not set to enabled, Exclaimer signature policies will **not** be applied to your organization's email messages.
Handled message classes	This section determines the type (class) of messages that will be handled by Signature Manager Exchange Edition. By default, the class for email messages (IPM.Note.*) is defined and under typical circumstances, this is sufficient. However, some organizations may wish to add signatures to other types of Outlook items - for example, to meeting requests or calendar appointments. If you wish to apply Signature Manager Exchange Edition to other items, use the **add** option to add the relevant class.
Show unhandled messages in status view	Select this option to report unhandled messages in the Windows event log [pg.46].

NOTE

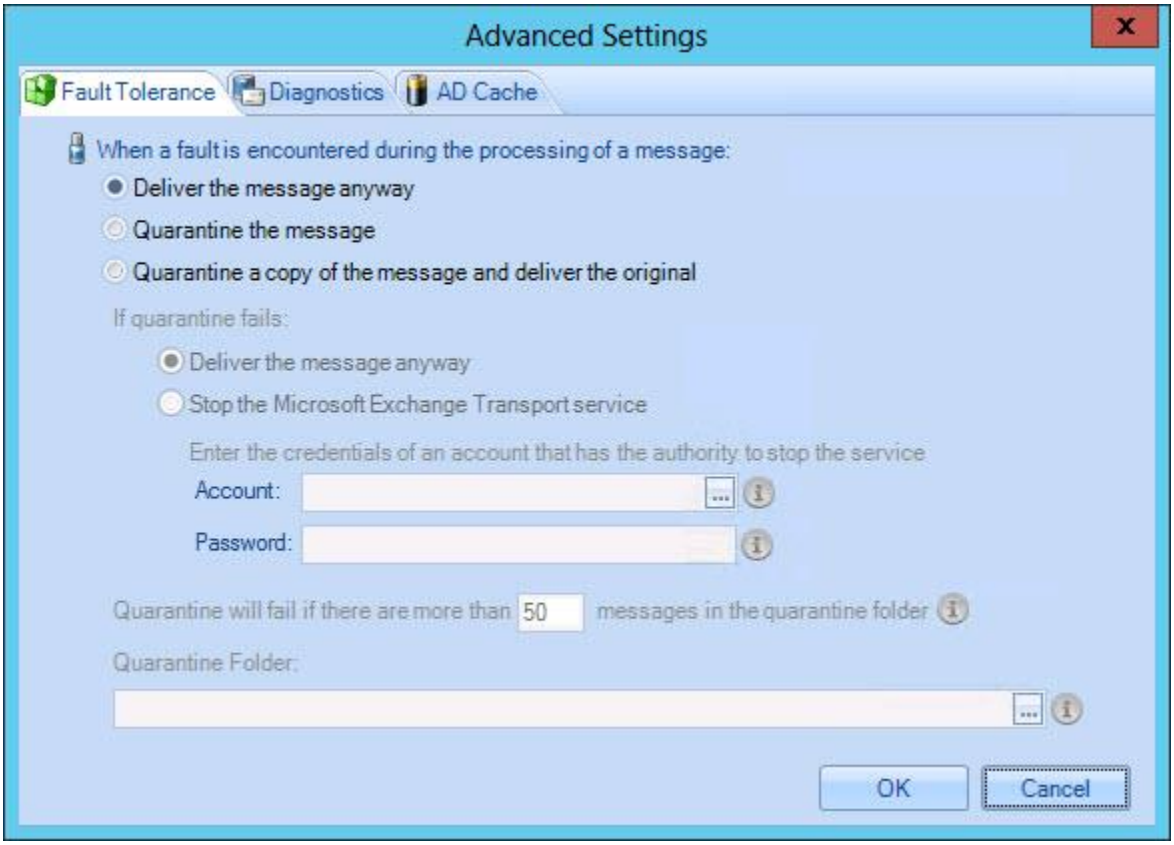
Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Advanced Settings

Click the advanced button on the settings tab to access additional settings for fault tolerance [pg.55], diagnostics [pg.57] and AD cache [pg.58], as summarized in the following sections.

Fault Tolerance

For some organizations, adding signatures (particularly disclaimers) to email messages is critical - to the extent that the Microsoft Exchange server must be stopped rather than send messages without correct signatures, in the event of a fault. For others, it is sufficient to quarantine messages but still send them in their original form. The fault tolerance tab allows administrators to specify how messages should be handled in the event of a fault during message processing:

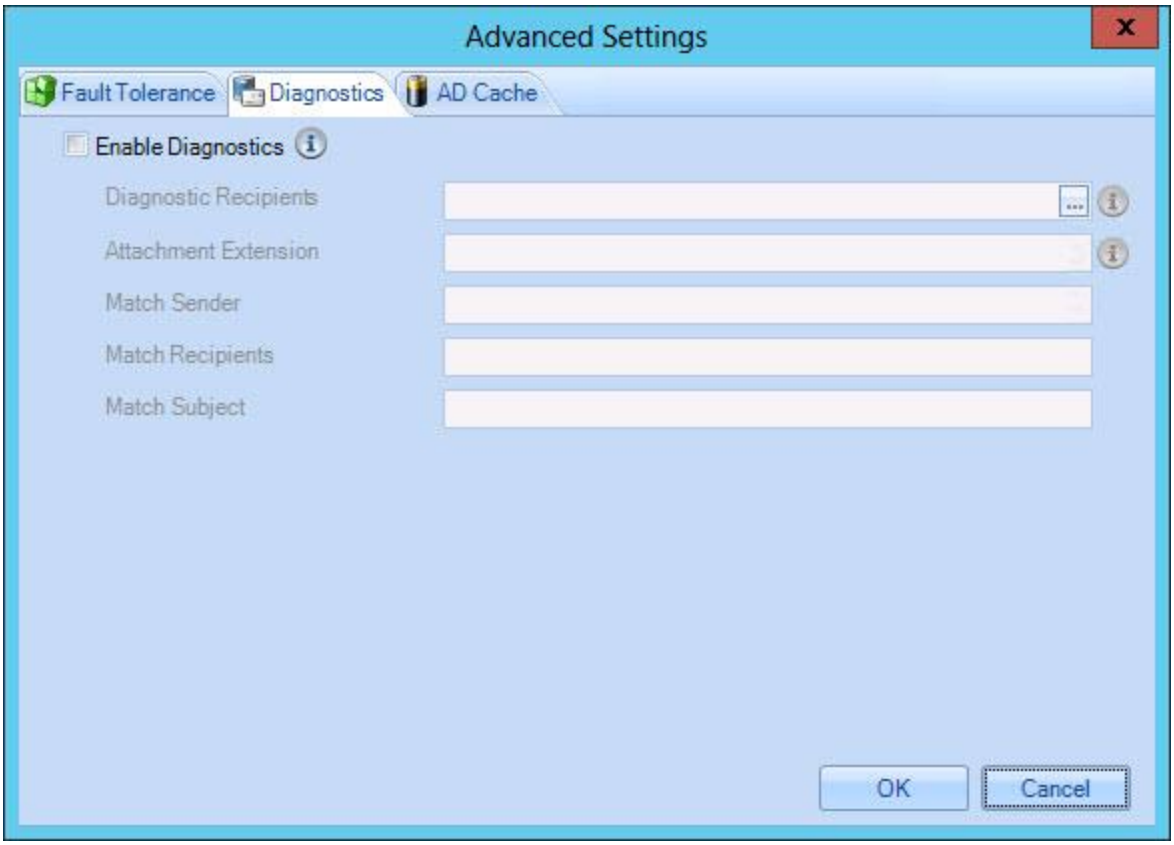

Advanced Settings
Fault Tolerance
Diagnostics
AD Cache
When a fault is encountered during the processing of a message:
Deliver the message anyway
Quarantine the message
Quarantine a copy of the message and deliver the original
If quarantine fails:
Deliver the message anyway
Stop the Microsoft Exchange Transport service
Enter the credentials of an account that has the authority to stop the service
Account:
Password:
Quarantine will fail if there are more than 50 messages in the quarantine folder
Quarantine Folder:
OK
Cancel

These options are summarized below:

Option	Summary
When a fault is encountered during the processing of a message	
Deliver the message anyway	In the event of a fault, deliver the message at whichever point it got to through Signature Manager Exchange Edition processing and do not take a quarantine copy. In this situation, the only indication that something went wrong would be an error in the Windows event log [pg.46].
Quarantine the message	In the event of a fault, quarantine the message and do not attempt delivery.
Quarantine the message and deliver the original	In the event of a fault, quarantine the message and deliver the message in its original form. In this situation, a copy of the message is stored in the quarantine folder for later analysis, and the message is sent at whichever point it got to through processing.
If quarantine fails	
Deliver the message anyway	If a quarantine setting is selected but quarantine is not possible at the time of a fault, deliver the message anyway.
Stop the Microsoft Exchange Transport Service	If a quarantine setting is selected but quarantine is not possible at the time of a fault, stop the Microsoft Exchange Transport Service so that all incoming and outgoing messages are stopped. To apply this setting, account credentials must be provided for a user with appropriate permissions to stop this service.
Quarantine will fail if there are more than xx messages in the quarantine folder	Use this option to specify a number of messages to be quarantined before quarantine fails and any 'if quarantine fails' actions come into force.
Quarantine Folder	Use the browse button - - to select a folder in which quarantined messages are stored.

Diagnostics

A diagnostics email is only used by Exclaimer support, in the event of a query. It contains information about particular emails, including system information, the email message before and after processing, status information and an exported econfig file for the Exclaimer Signature Manager Exchange Edition installation. This option should not be enabled unless you are asked to do so by Exclaimer support:

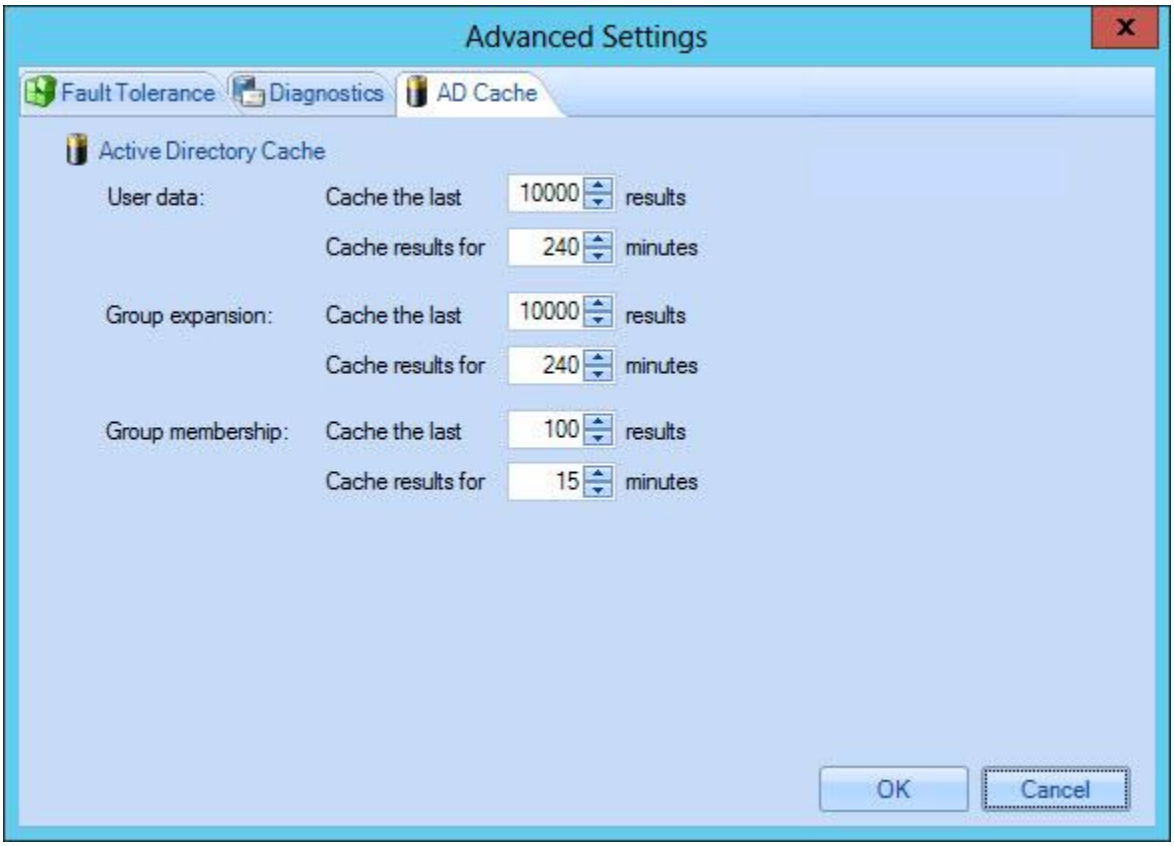


These options are summarized below:

Option	Summary
Enable diagnostics	Select this option to enable diagnostics.
Diagnostic Recipients	Use the browse button - ... - to select people who should receive the diagnostics email.
Attachment Extension	Some diagnostic information is sent as an attachment with the diagnostics email. This is a standard extension to apply to all attachments (this can be useful - for example - to stop diagnostic emails being blocked by anti-virus and anti-spam applications).
Match Sender	The sender of the messages to be matched for diagnostics emails.
Match Recipients	The recipient of messages to be matched for diagnostics emails.
Match Subject	The subject of the messages to be matched for diagnostics emails.

AD Cache

To optimize performance, Signature Manager Exchange Edition caches information from your Active Directory. Use AD cache options to determine how cached information is handled:



These options allow you to specify cache thresholds for different Active Directory elements as summarized below:

Option	Summary
User Data	This data is used to populate fields [pg.215] that may be defined within signature templates [pg.176].
Group Expansion	This data is concerned with any nested groups - i.e. a group within another group.
Group Membership	This data is concerned with a list of users and groups that belong to a group.

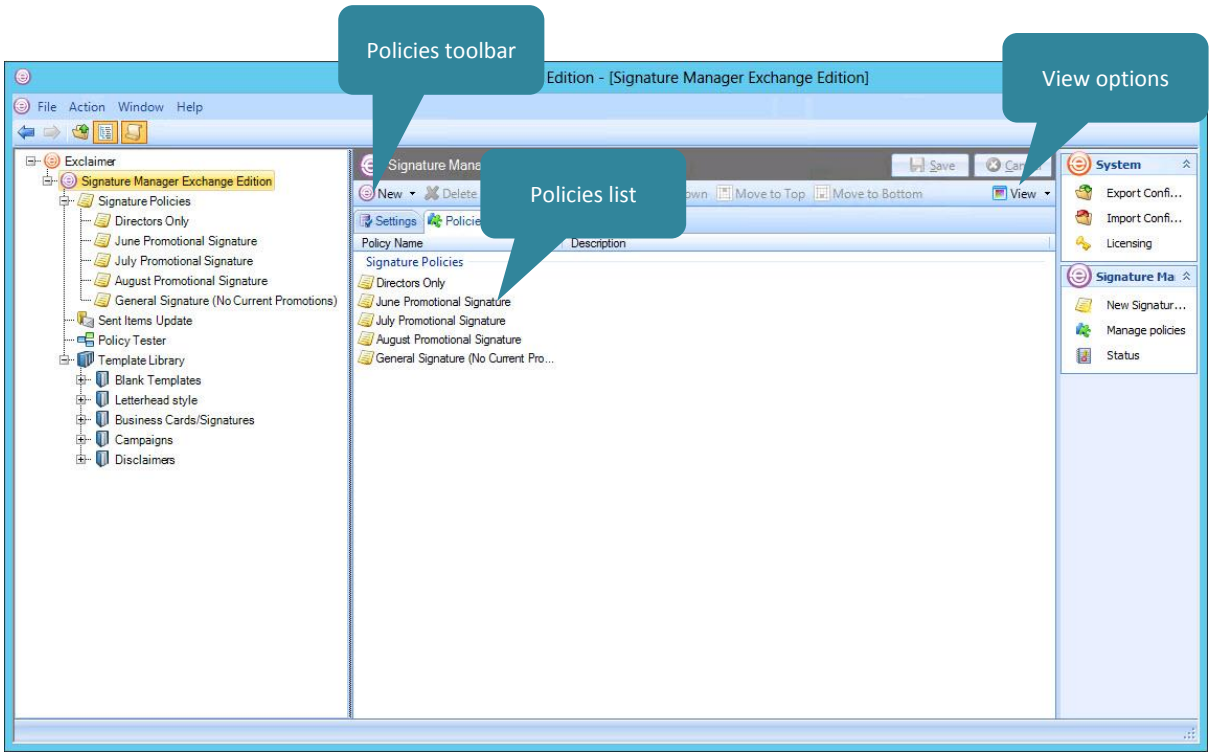
The Settings Toolbar

When the settings tab is displayed, the settings toolbar contains the following options:

Toolbar Option	Summary
New	Select this option to access the new signature policy [pg.116] option.

Signature Manager Exchange Edition Policies List

The policies tab contains quick access to existing policies and options for completing key tasks relating to policies:



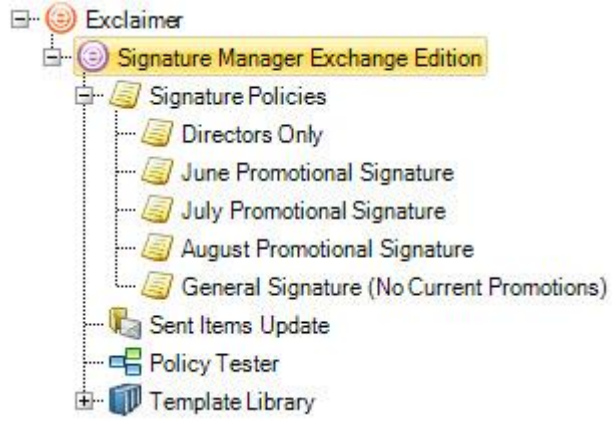
It is important to note that policies are processed in the order that they are listed here. You can use move up / move down or move to top / move to bottom [pg.61] options to change the sequence of this list, and use next policy [pg.114] options for greater control over processing sequence.

Available options are summarized in the following sections:

- The policy list [pg.61]
- Policy options [pg.61]
- The policies toolbar [pg.61]
- View options [pg.62]

The Policy List

All existing policies are listed in the main content area; these are the same policies that you will see listed in the console tree:



It does not matter if you access policies from the console tree; or from the policy list - use whichever method is most convenient for the task in hand.

Policy Options

Double-click any policy in the list to access available options for that policy. See the anatomy of a policy [pg.77] for further information about these options.

The Policies Toolbar

When the policies tab is displayed, the policies toolbar contains the following options:

Toolbar Option	Summary
New	Select this option to access the new Signature Manager Exchange Edition policy [pg.116] option.
Delete	Use this option to remove [pg.125] the currently selected policy. Select a policy from the list and use this option to delete it - the policy is removed from the list but is only permanently deleted when changes are saved [pg.44].
Clone	If you need to create a policy which is similar to an existing policy, use this option to clone [pg.122] (duplicate) the existing policy and then edit [pg.123] the duplicate version as required (this can be much quicker than creating a new policy from first principles).
Move Up / Move Down / Move to Top / Move to Bottom	Use these options to reorganize the policy list and determine the order in which policies are applied. Select a policy and click move up or move down as required.

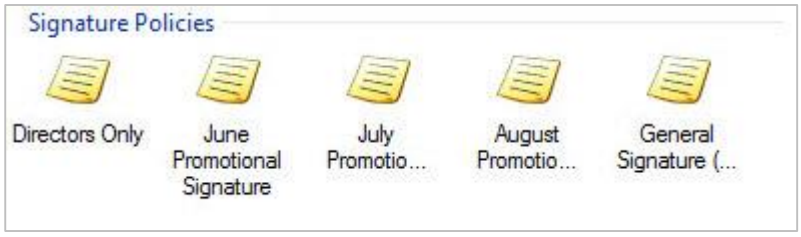
NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

View Options

The view option can be used to determine whether policies are displayed in list (details) form...

... or as large icons:



Chapter 5

Working with Signature Policies

Introduction

Exclaimer Signature Manager Exchange Edition allows you to define any number of templates [pg.176] which can include signatures, disclaimers, branding and email formatting. However, 'one size' rarely fits all - for example, an organization with locations around the country may need a standard company signature for all messages but in addition to this:

- Each office location may require its own email layout, signature style and branding
- Each department within the organization may require supplementary disclaimers or sign-off messages
- Certain people within a department may require additional signature information
- At weekends, certain departments may need to apply alternative signature information

Using Exclaimer Signature Manager Exchange Edition, you can create policies to control the circumstances under which templates are used. In short, a policy can be thought of as a set of rules or conditions that must be met for a template to be applied to email messages.

Policies can be as simple or as complex as required. For example, a plain text signature for all outgoing messages might be sufficient for one organization, whereas others may have more complex requirements, incorporating heavily formatted templates and a series of connected rules created with a policy chain [pg.127].

This section contains key information for working with policies, including:

- Accessing existing policies [pg.148]
- General policy settings [pg.68]
- The anatomy of a policy [pg.77]
- Adding a new policy [pg.116]
- Cloning a policy [pg.122]
- Changing a policy [pg.123]
- Enabling and disabling a policy [pg.124]
- Removing a policy [pg.125]

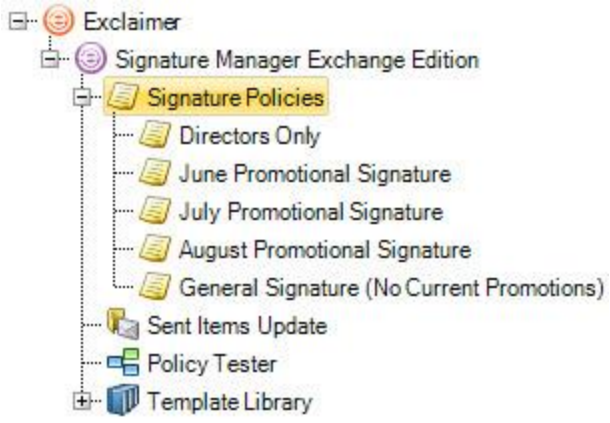
You can also learn more about specific tasks, using the how to [pg.126] section for signature policies.

Accessing Existing Policies

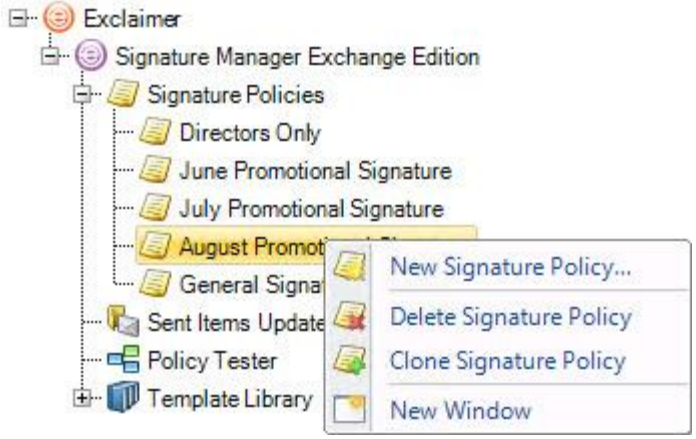
Within Exclaimer Signature Manager Exchange Edition, policies are accessed via the Exclaimer console tree [pg.35], or by using policy tabs [pg.36] from other branches of the console tree.

Navigating Policies Using the Console Tree

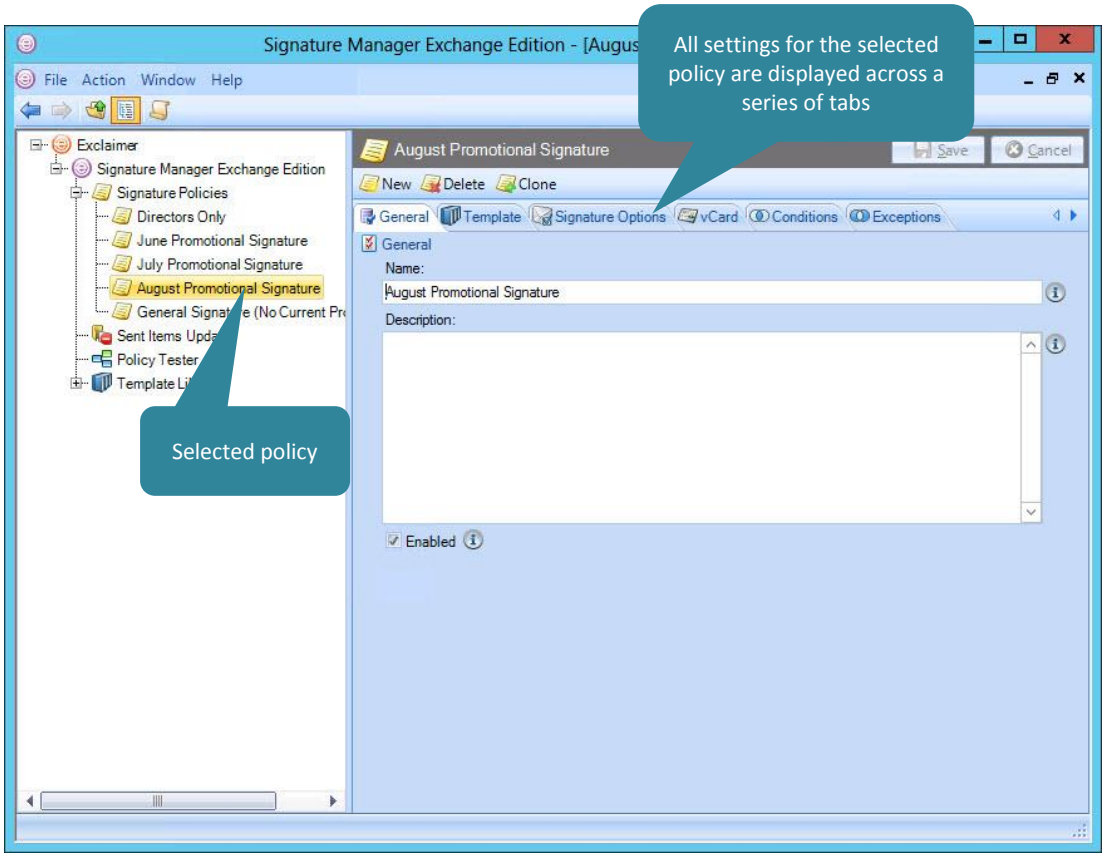
All work with policies is completed from the signature policies branch of the Exclaimer console tree [pg.49]:



From here you can view any existing policies (as child branches within the tree). Select any policy from the tree and right-click to view actions that can be taken with that policy:



Having selected a policy from the tree, use the content pane to access all setup options and actions from the content pane:



NOTE

See the anatomy of a policy [pg.77] for further information about policy setup options.

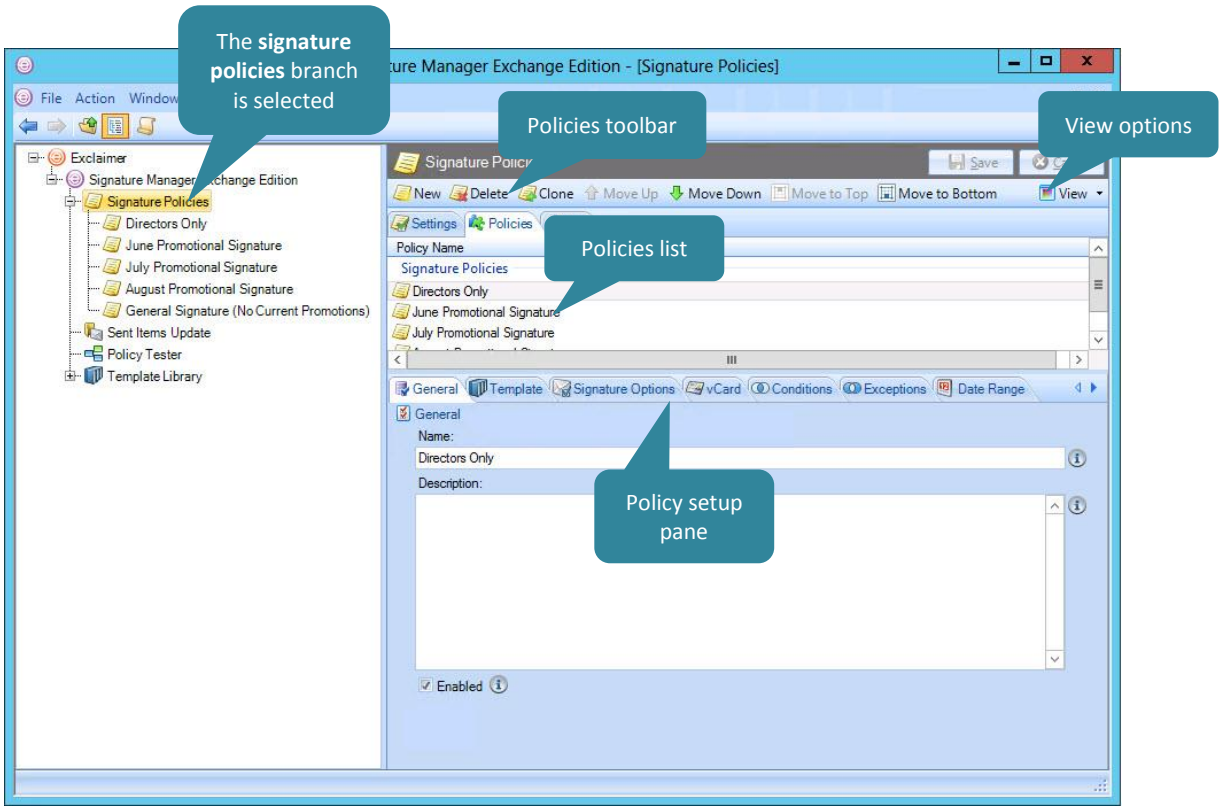
Navigating Policies Using Policy Tabs

Existing policies can also be accessed from other branches of the console tree, via a policy tab in the content pane. For example, select the Signature Manager Exchange Edition branch and then select the policies [pg.74] tab in the content pane.

It is important to note that policies are processed in the order that they are listed here. You can use move up / move down or move to top / move to bottom [pg.61] options to change the sequence of this list, and use next policy [pg.114] options for greater control over processing sequence.

General Signature Policy Settings

When the signature policies branch is selected (within the Exclaimer console [pg.31]), general signature policy settings and information can be viewed and updated:



From here, you can:

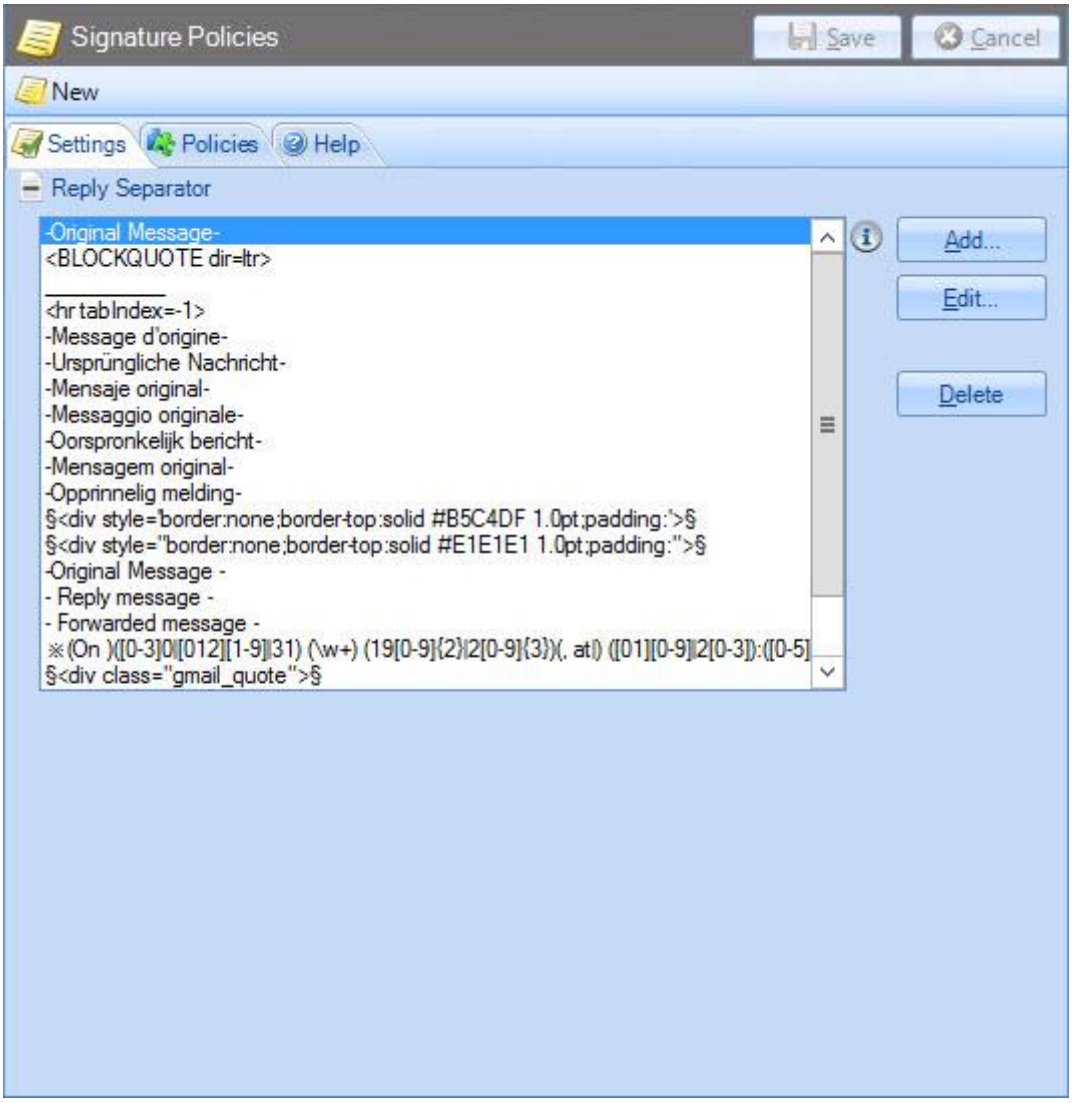
- Navigate the console tree to access signature policies [pg.77], the policy tester [pg.162] and the template library [pg.176]
- Update general settings [pg.68] for signature policies from the settings tab
- View existing policies [pg.60] from the policies tab
- Add a new signature policy [pg.116] via the actions pane

NOTE

For further information about the Exclaimer Console (including the menu, toolbar and **actions** pane), see understanding the Exclaimer Console window [pg.36].

Signature Policy Settings

When the signature policies branch is selected (within the Exclaimer console [pg.31]), the settings tab is displayed so that reply separator information can be viewed or updated:



When designing signature templates [pg.176], you have the opportunity to specify whether signatures are placed before or after the original message [pg.207]. For example, when replying to a message, it is preferable to place the signature after the reply, rather than at the end of the email.

A reply separator contains information which determines how Exclaimer Signature Manager Exchange Edition identifies a message reply or a forwarded message, so that signatures are correctly placed.

When Exclaimer Signature Manager Exchange Edition is installed, a range of common reply separators are included. Under normal circumstances, administrators do not need to change this information unless a custom reply separator [pg.69] is required.

Using Custom Reply Separators

When Exclaimer Signature Manager Exchange Edition is installed, standard reply separators [pg.68] are included. Under normal circumstances, administrators do not need to change this information unless a custom reply separator is required.

To add a new reply separator, access the signature policy settings [pg.68] tab and click the add button to open the add/edit reply separator window:

When defining custom separators, you can use:

- Underscores [pg.70]
- Hyphens [pg.70]
- HTML tags [pg.71]
- HTML style attributes [pg.72]
- Spaces [pg.72]
- Regular expressions [pg.73]

Underscores

Character	Description	Exclaimer Interpretation.
_	Single underscore	Look for one or more consecutive underscores.
__	Double underscore	Look for two underscores, one after the other, followed by more consecutive underscores.
___	Triple underscore	Look for three underscores, one after the other, followed by more consecutive underscores.

Hyphens

Character	Description	Exclaimer Interpretation.
-	Single hyphen	Look for one or more consecutive hyphens.
--	Double hyphen	Look for two hyphens, one after the other, followed by more consecutive hyphens.
---	Triple hyphen	Look for three hyphens, one after the other, followed by more consecutive hyphens.
	When searching for the specific string '-Original Message-' as a reply separator, Exclaimer Signature Manager Exchange Edition matches one or more hyphens at the start and end of the text 'original message'. It will also accept a trailing line space before the text, 'Original Message'. For example, Exclaimer Signature Manager Exchange Edition will match: - - - - - - -Original Message- - - - - - - - -Original Message- - - -Original Message-	

HTML Tags

Exclaimer Signature Manager Exchange Edition can resolve HTML tags as reply separators. It matches first the element, then the attribute (if present in the search string) and finally the attribute value (if present in the search string). This matching process is illustrated below:

First, match the element:

```
<hr tabIndex=-1>
```

Next, match the attribute for the element:

```
<hr tabIndex=-1>
```

Finally, match the attribute value:

```
<hr tabIndex=-1>
```

Example

Suppose that the tag below was specified as a separator:

```
<hr tabIndex=-1>
```

For this string, Exclaimer Signature Manager Exchange Edition will match any horizontal rule with a **tabindex** of **-1**. The horizontal rule can include other attributes and values but it must have the attribute and value of **tabIndex=-1**. As such, the following elements would be matched:

```
<hr tabIndex=-1 color=#333333 size=1>
```

...or

```
<hr color=#333333 tabIndex=-1>
```

However, the following element would not be matched (because the attribute value is set to -2 rather than -1):

```
<hr tabIndex=-2>
```

HTML Style Attributes

Style attributes are resolved in a similar way to HTML tags, described in the previous section.

Example

Suppose that the tag below was specified as a separator:

```
<div style='border:none\;border-top:solid #B5C4DF 1.0pt\;padding:'>
```

For this text string, Exclaimer Signature Manager Exchange Edition will match any **div** tag containing a style attribute of '**border:none\;border-top:solid #B5C4DF 1.0pt\;padding:'**.

The **div** tag can include other attributes but it must include the attribute and values **style='border:none\;border-top:solid #B5C4DF 1.0pt\;padding:'**. As such, the following style attributes would be matched:

```
<div style='border:none;border-top:solid #B5C4DF 1.0pt;padding:10pt 0pt 0pt 10pt'>
```

...or

```
<div id=default style='border:none;border-top:solid #B5C4DF 1.0pt;padding:10pt 0pt 0pt 10pt'>
```

However, the following element would not be matched

```
<div style='border:solid #333333 1.0pt'>
```

Spaces

Exclaimer Signature Manager Exchange Edition will handle spaces when searching for a specific string. A match will be made if a tab occurs within the space and if a space rolls over into a line break. For example, Exclaimer Signature Manager Exchange Edition will match:

```
-Original  Message-
```

...or

```
-Original    Message-
```

...or

```
-Original
Message-
```

Regular Expressions

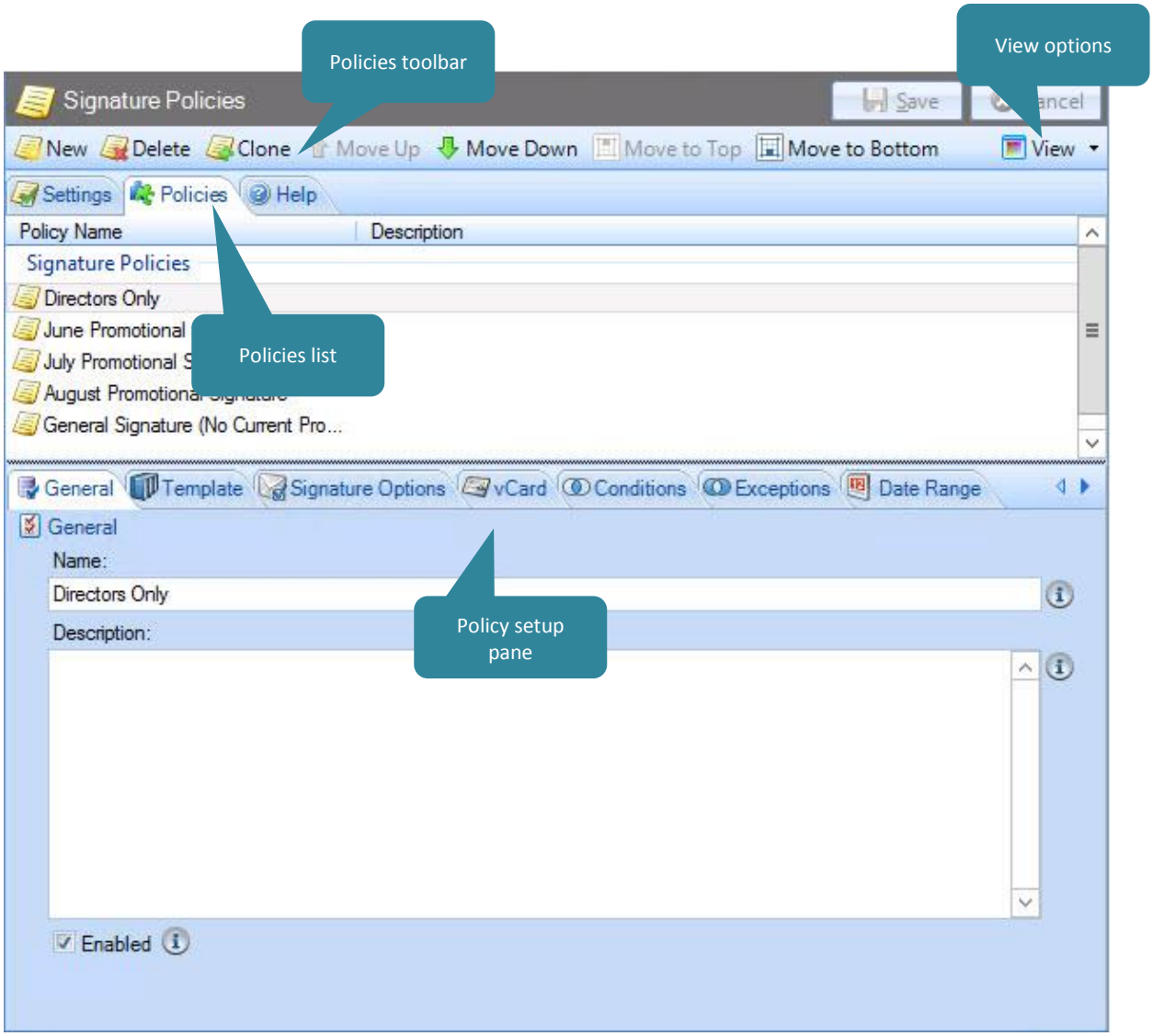
Many common reply separators are static - i.e. a given string of text and/or characters. However, with the proliferation of email applications on mobile devices, variances between regions, etc., relying on static reply separators may not always be sufficient.

If required, dynamic reply separators can be handled using regular expressions. Regular expressions are used to express how the software should look for a specified pattern in text and then what to do when a pattern match is found.

The composition of regular expressions is an advanced task, which may require some knowledge of programming. If this is a requirement, please contact Exclaimer support [pg.11].

The Policies List

The policies tab contains quick access to existing policies. From here, you can select any policy from the list to view or edit its setup details:

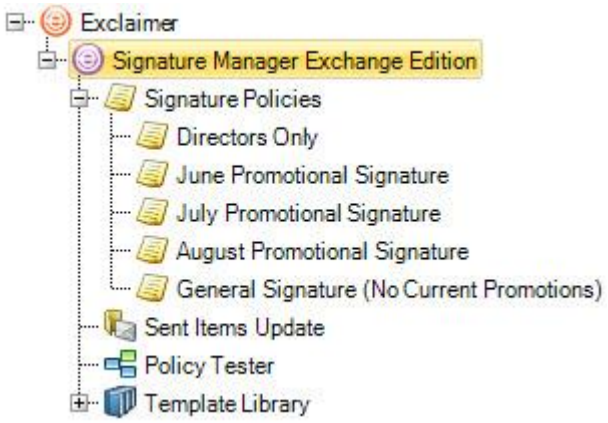


It is important to note that policies are processed in the order that they are listed here. You can use move up / move down or move to top / move to bottom [pg.61] options to change the sequence of this list, and use next policy [pg.114] options for greater control over processing sequence. Available options are summarized in the following sections:

- The policy list [pg.75]
- The policy setup pane [pg.75]
- The policies toolbar [pg.76]
- View options [pg.76]

The List of Policies

All existing policies are listed in the upper section of the main content area; these are the same policies that you will see listed in the console tree:



It does not matter if you access policies from the console tree, or from the policy list shown here - use whichever method is most convenient for the task in hand.

The Policy Setup Pane

When a policy is selected in the policy list (the upper section of the content pane), all setup options for that policy are available in the lower section of the content pane. These options are organised across a series of tabs:

- General [pg.78]
- Template [pg.79]
- Signature options [pg.82]
- vCard [pg.86]
- Conditions [pg.90]
- Exceptions [pg.102]
- Date range [pg.112]
- Next policy [pg.114]

The Policies Toolbar

When the policies tab is displayed, the policies toolbar contains the following options:

Toolbar Option	Summary
New	Select this option to access the new Signature Manager Exchange Edition policy [pg.116] option.
Delete	Use this option to remove [pg.125] the currently selected policy. Select a policy from the list and use this option to delete it - the policy is removed from the list but is only permanently deleted when changes are saved [pg.44].
Clone	If you need to create a policy which is similar to an existing policy, use this option to clone [pg.122] (duplicate) the existing policy and then edit [pg.123] the duplicate version as required (this can be much quicker than creating a new policy from first principles).
Move Up / Move Down	Use these options to reorganize the policy list and determine the order in which policies are applied. Select a policy and click move up or move down as required.

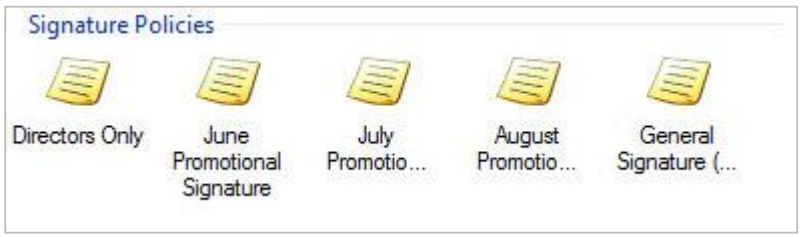
NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

View Options

The view option can be used to determine whether policies are displayed in list (details) form...

... or as large icons:



The Anatomy of a Policy

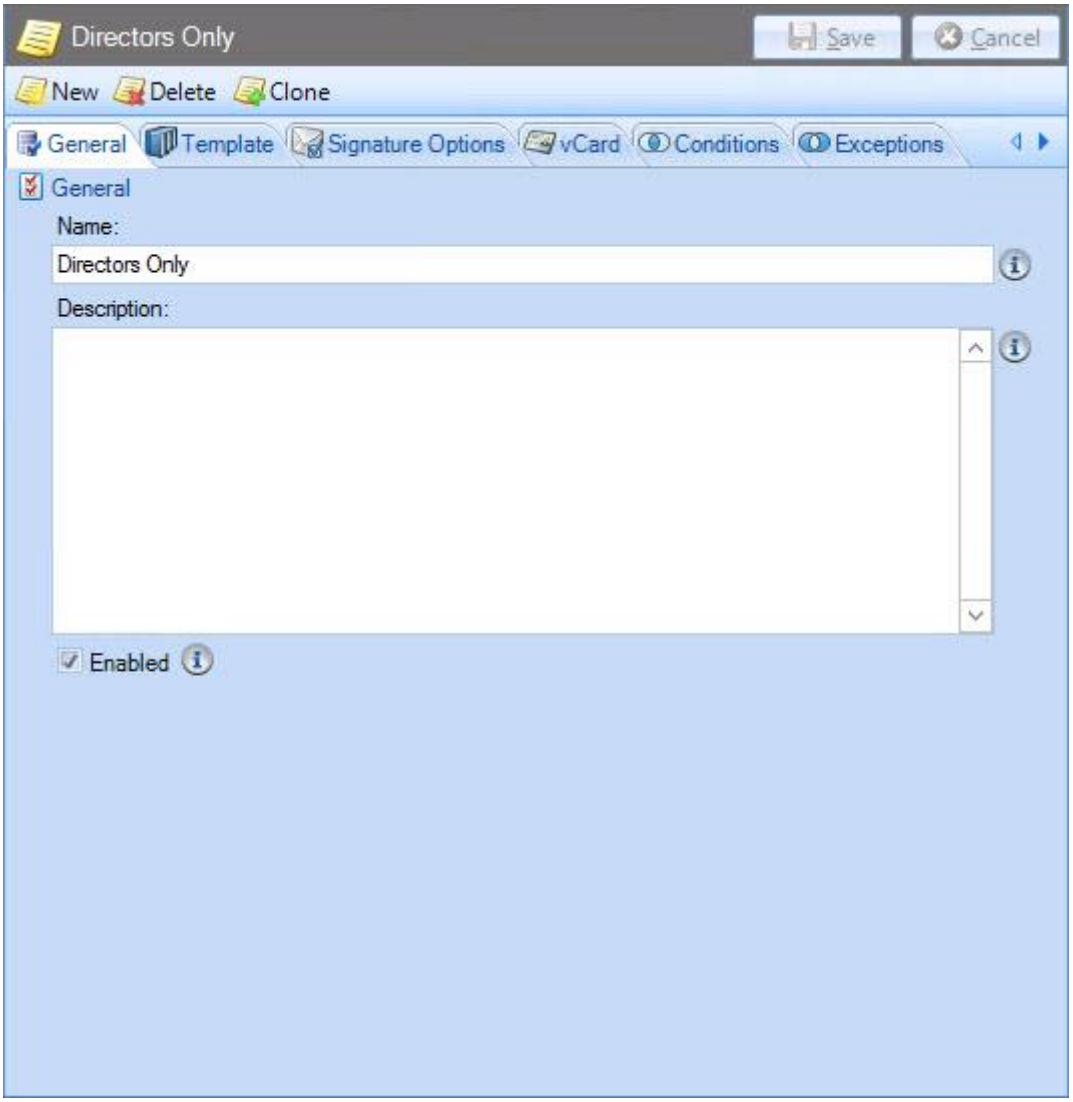
A signature policy is comprised of a range of settings which control how signatures look and behave. These settings are organized across a series of tabs, displayed in the content pane when a policy is selected:

These options are summarized in the following sections:

- General [pg.78]
- Template [pg.79]
- Signature options [pg.82]
- vCard [pg.86]
- Conditions [pg.90]
- Exceptions [pg.102]
- Date range [pg.112]
- Next policy [pg.114]

General

Options on the general tab are used to define basic information for a policy. These settings determine how the policy is displayed throughout the system, and whether or not it is active:

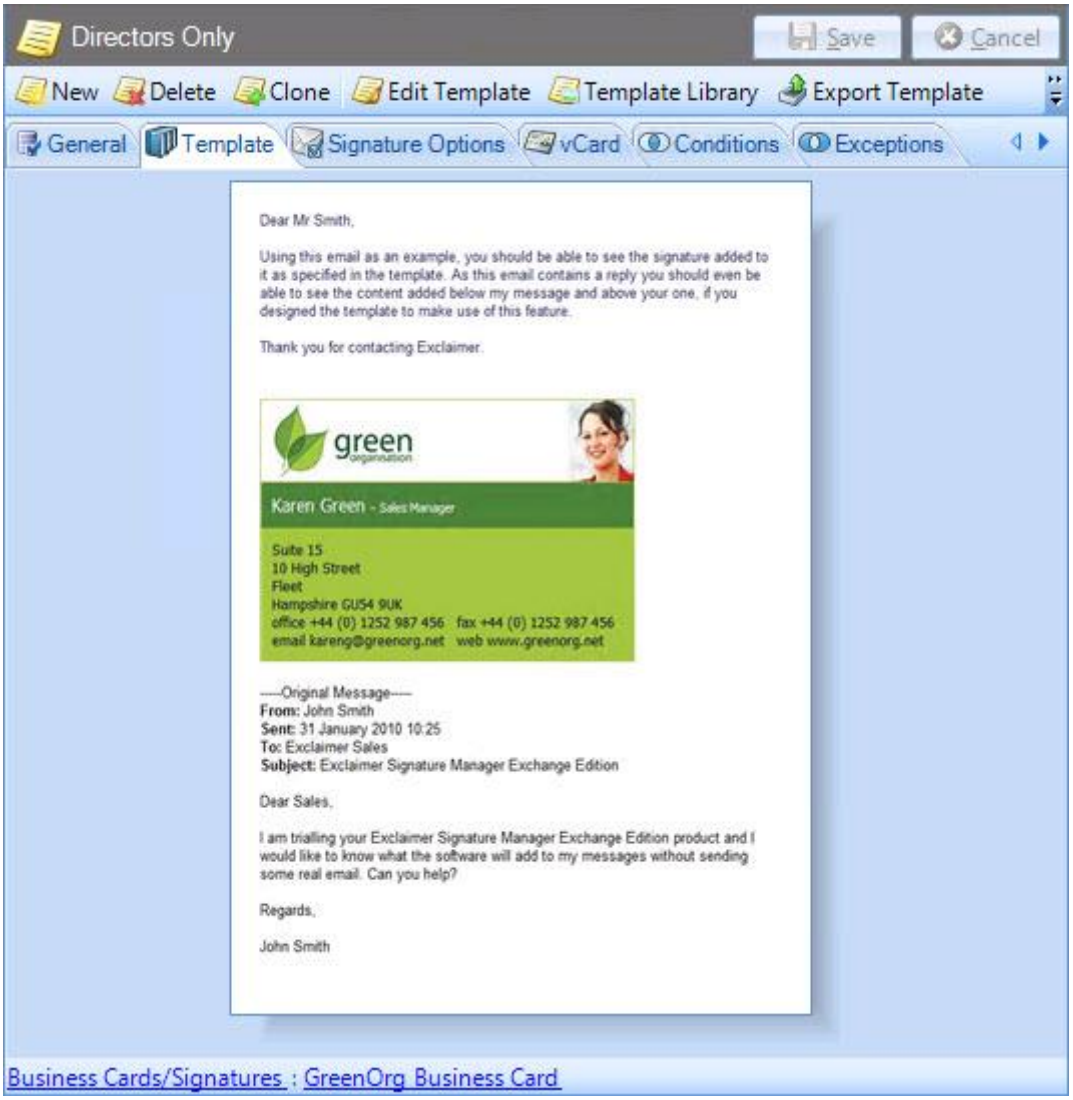


Options on this tab are summarized below:

Option	Summary
Name	Each policy must have a unique name. The name entered here is displayed in the Exclaimer console tree, and on any other policy lists.
Description	This field can be used to add any useful information for the policy - for example, usage notes, version history, background or explanatory information. The first line of description text is displayed in any policy lists (but not the console tree).
Enabled	Select this option to activate the policy. If a policy is not enabled, it will not run.

Template

The template tab shows which template is associated with the selected policy:


Directors Only
Save
Cancel
New
Delete
Clone
Edit Template
Template Library
Export Template
General
Template
Signature Options
vCard
Conditions
Exceptions
Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
green
Karen Green - Sales Manager
Suite 15
10 High Street
Fleet
Hampshire GU54 9UK
office +44 (0) 1252 987 456 fax +44 (0) 1252 987 456
email kareng@greenorg.net web www.greenorg.net
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Dear Sales,
I am trialling your Exclaimer Signature Manager Exchange Edition product and I would like to know what the software will add to my messages without sending some real email. Can you help?
Regards,
John Smith
Business Cards/Signatures : GreenOrg Business Card

The associated template is previewed in the content pane. Here, a sample email is used to show how any content, layout, formatting, and signature properties in the template will be applied to messages. From here you can:

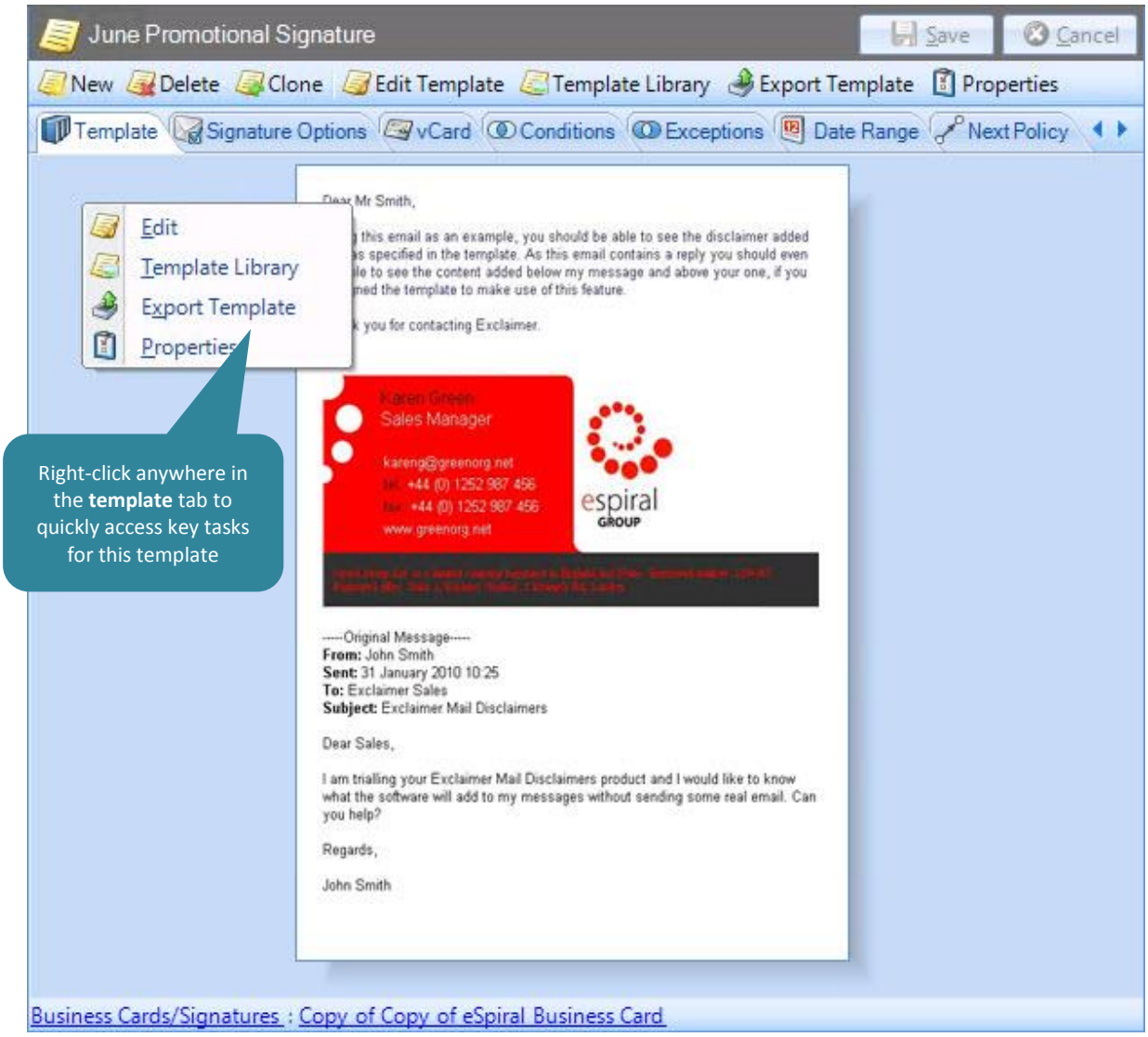
- Double click anywhere in the content pane to edit the template in the template editor [pg.190]
- Use the breadcrumb trail at the bottom of the window to navigate templates

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

Right-Click Options

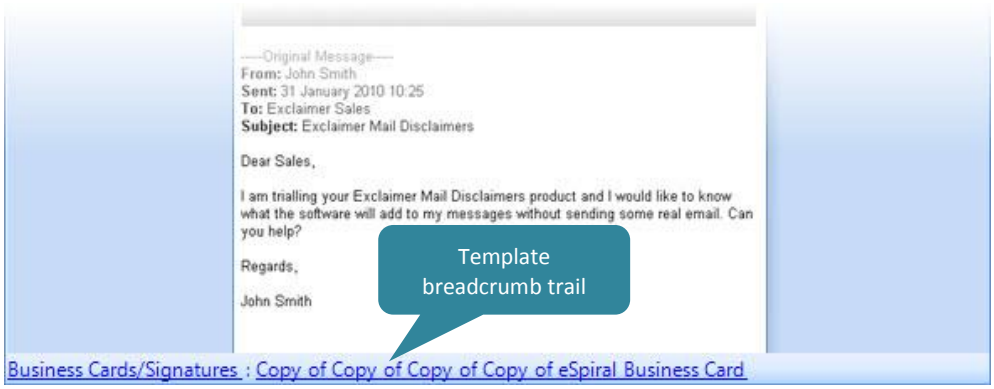
For quick access to key tasks that you may wish to complete for the template that is associated with a policy, simply right-click anywhere within the template tab:



From here, you can choose to edit [pg.193] this template, open the template library [pg.177], export the template [pg.190] or view template properties [pg.196].

The Template Breadcrumb Trail

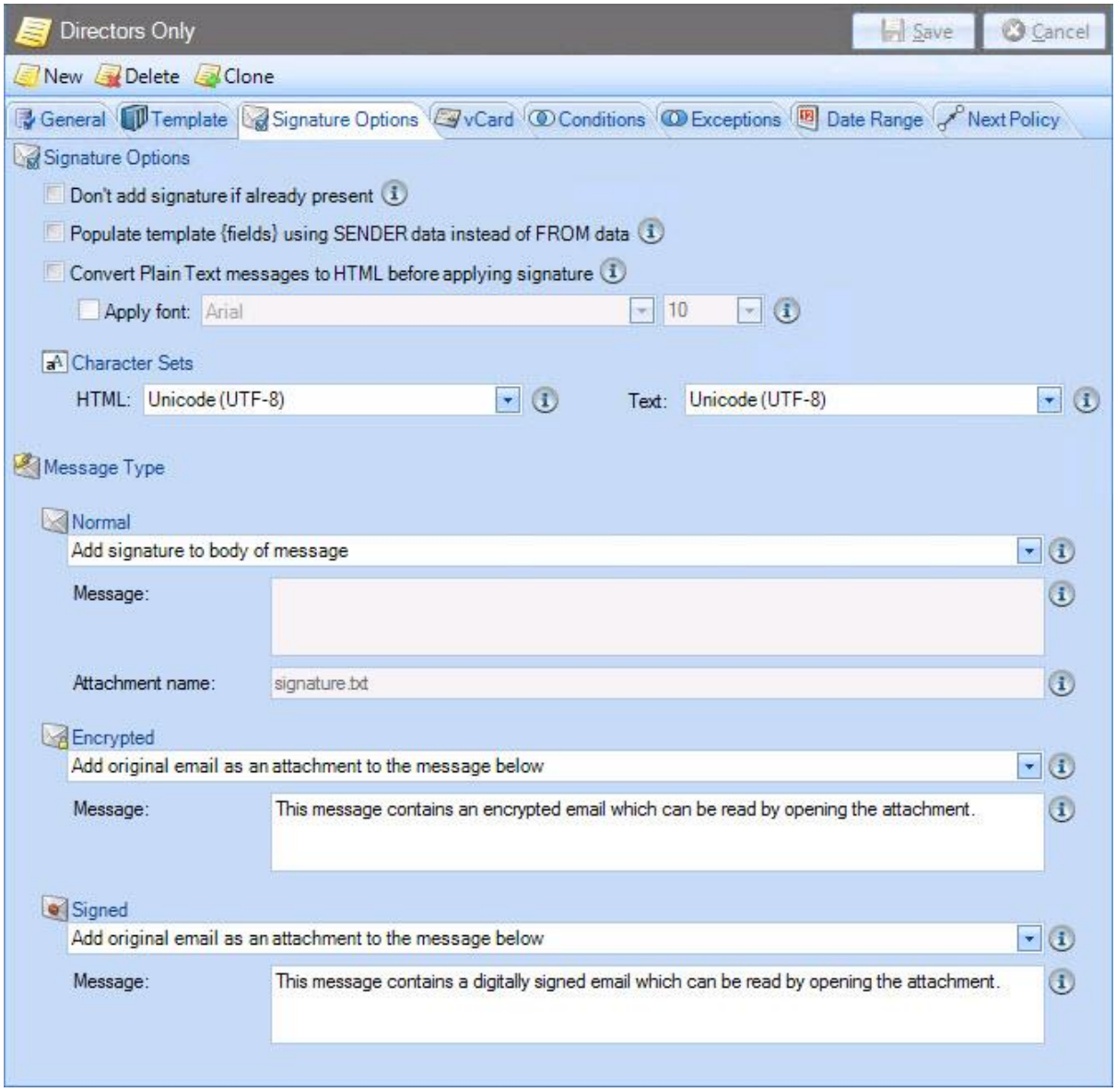
At the bottom of the template preview, a breadcrumb trail displays the name of the template being used, together with its parent category [pg.179] in the template gallery:


-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Mail Disclaimers
Dear Sales,
I am trialling your Exclaimer Mail Disclaimers product and I would like to know what the software will add to my messages without sending some real email. Can you help?
Regards,
John Smith
Template breadcrumb trail
Business Cards/Signatures : Copy of Copy of Copy of Copy of eSpiral Business Card

Click an entry in the breadcrumb trail to navigate to that branch of the Exclaimer console tree.

Signature Options

The signature options tab is used to determine how the signature is applied:



Options on this tab are summarized below:

Option	Summary
Don't add signature if already present	Check this option if you do not wish to add this signature more than once - for example, during an email 'conversation' where there are multiple replies.
Populate template {fields} using SENDER data instead of FROM data	This option is used to handle cases where a user is delegated to send email messages on behalf of another user. Under normal circumstances, the message sender and the from address are the same however, if your organization includes users with permissions to send messages on behalf of other users, message sender and from details may differ. In this case, you can choose which details should be used to populate any signature template fields when the policy is applied. For a more detailed explanation of the message sent on behalf scenario, please refer to the message fields [pg.219] section of this guide.
Convert Plain Text messages to HTML before applying signature	Check this option if you wish to convert plain text messages to HTML. Since this setting is defined per policy, you have full control over whether incoming, outgoing or both types should be converted. When this option is selected, you should choose the font type and size to be applied when the conversion takes place.
HTML Character Set	Select a character set for any HTML messages to which this policy is applied. This setting is typically used where a signature contains extended characters which may not be present in the original email. The recommended setting is UTF-8 because this can encode all characters in a space efficient manner.
Text Character Set	Select a character set for any Plain Text messages to which this policy is applied. This setting is typically used where a signature contains extended characters which may not be present in the original email. The recommended setting is UTF-8 because this can encode all characters in a space efficient manner.
Message Type - Normal	Select how you would like the signature to be added to normal emails. A normal email is one which is unsigned and unencrypted. Typically, the add signature to body of message option is used for normal messages, but the following options are available: **Add signature to body of message** — Insert the signature into the email content. **Add plain text version of signature as an attachment** — Do not alter the email content but send a text version of the signature as an attachment with the message. **Add original message as an attachment of the message below** — Use the message field to enter a message that will be sent to the recipient, with the original message as an attachment. You should also specify an attachment name for the attached file.

Option	Summary
	….continued

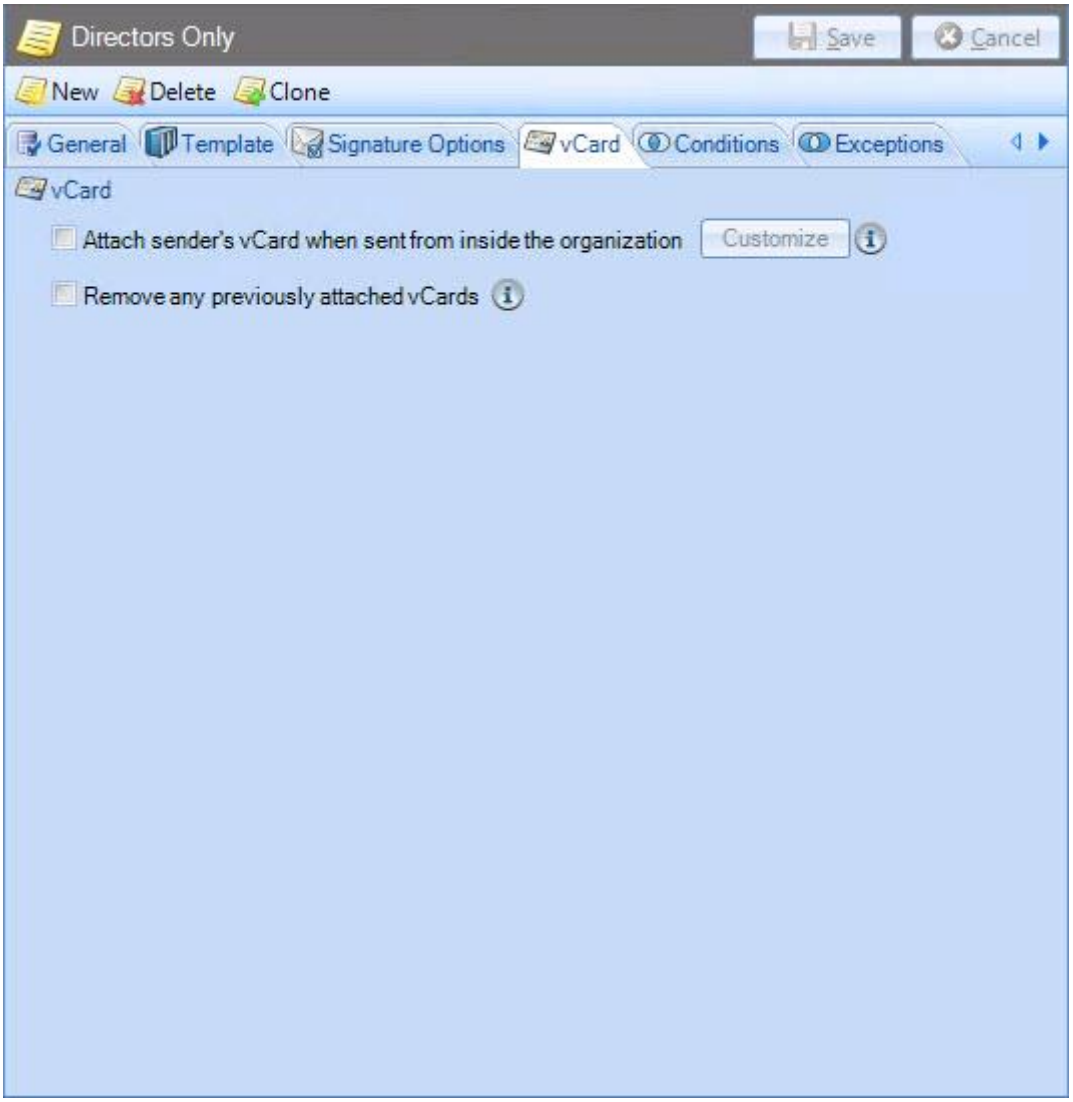
Option	Summary
Message Type - Encrypted	In simple terms, encryption is a way of protecting an email message so that only intended recipients can view it. It is not feasible to alter encrypted emails by adding signatures into the content, therefore the following options are available: **Don't add signature** — Don't apply any signatures when sending encrypted emails. **Add original message as an attachment of the message below** — Use the message field to enter a message that will be sent to the recipient, with the encrypted message as an attachment.
Message Type - Signed	In simple terms, a signed email is one where a sender has a security certificate installed which enables them to digitally sign emails. This means that recipients of signed emails can be certain that the email was genuinely sent from the email address given, and that the content of the email has not been altered since it was first sent. It is not feasible to alter signed emails by adding signatures into the content, therefore the following options are available: **Don't add signature** — Don't apply any signatures when sending signed emails. **Add original message as an attachment of the message below** — Use the message field to enter a message that will be sent to the recipient, with the signed message as an attachment.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

vCard

The vCard tab is used to determine if and then how vCards (electronic business cards) should be attached to email messages:



Options on this tab are summarized below:

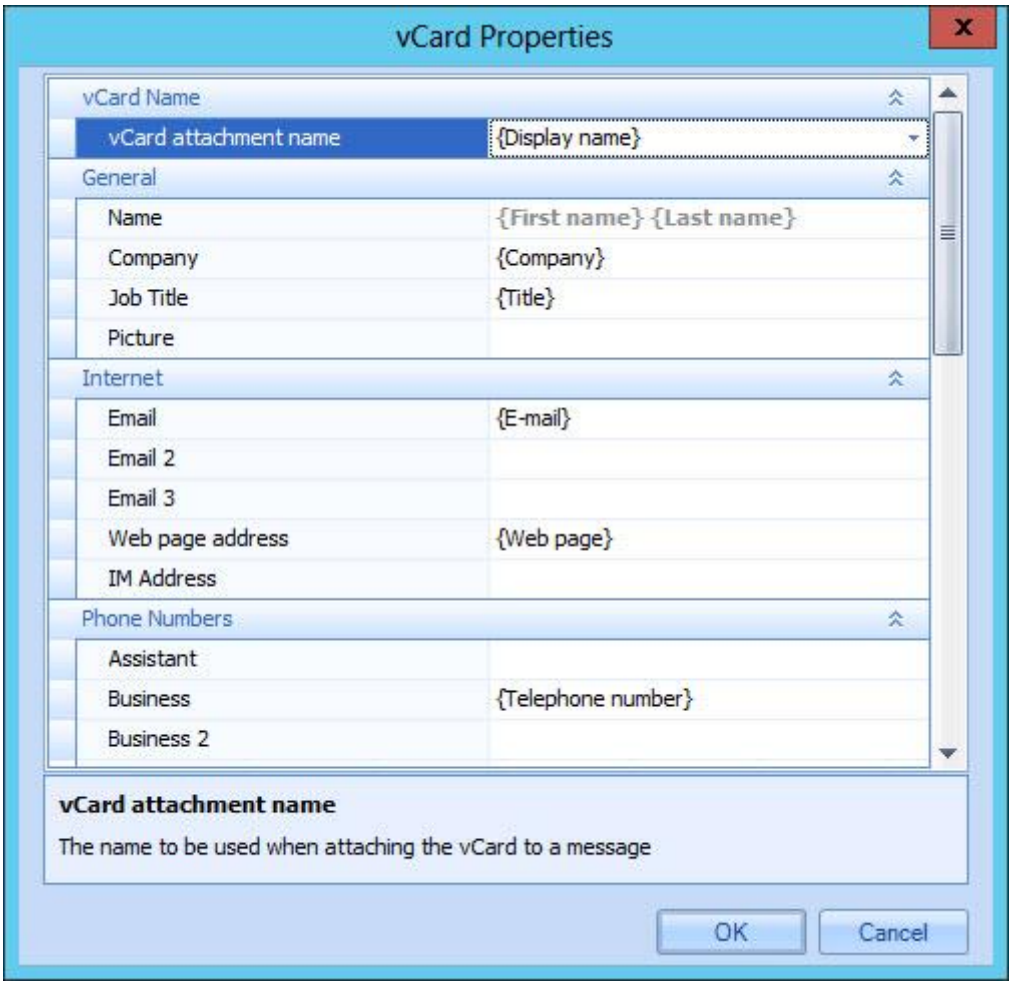
Option	Summary
Attach sender's vCard when sent from within the organization	Select this option if, when this policy is applied, the sender's vCard should be attached to email messages that they send from within the organization. If required, click the customize [pg.88] button to change the content of vCards.
Remove any previously applied vCards	If you have chosen to attach the sender's vCard, it is advisable to also select this option; otherwise multiple copies of the same vCard could be attached within a conversation.

NOTE

Changes are retained if you move to other tabs within the content pane. When you are satisfied that all tabs have been updated correctly, click the **save** button to save changes [pg.44] across all tabs. Alternatively, use the **cancel** button to abandon all changes.

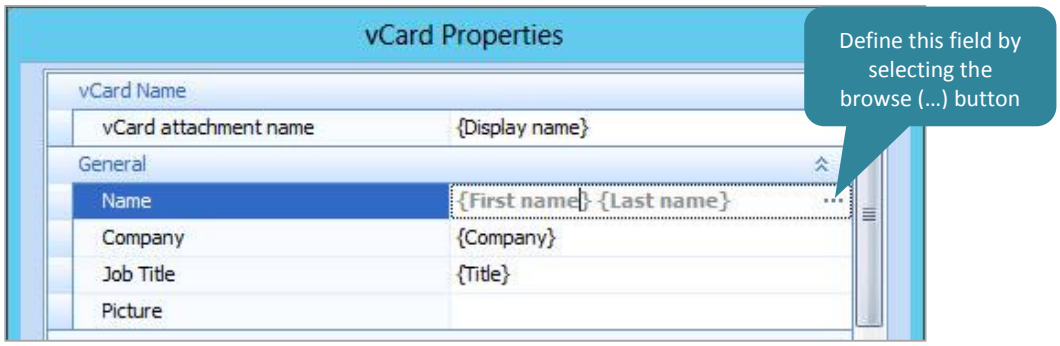
Customizing vCards

Having chosen to attach vCards, the customize button is enabled. If required, you can use this option to view/update vCard properties:

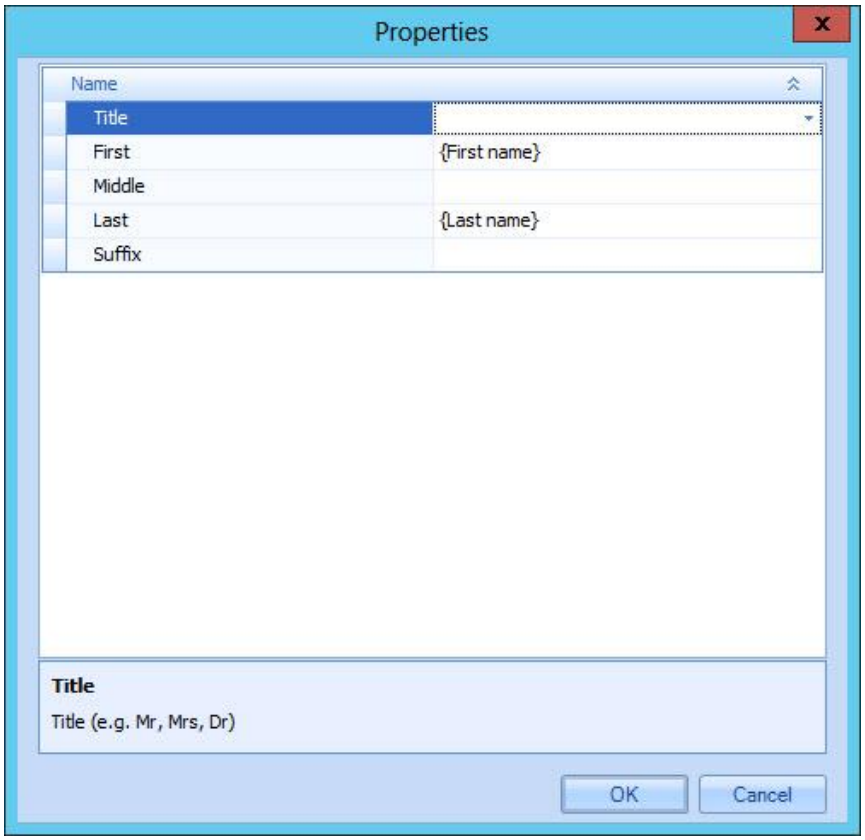


vCard details are taken from the Active Directory. Available details are listed on the left-hand side and associated properties (i.e. Active Directory fields) are selected from the right-hand side.

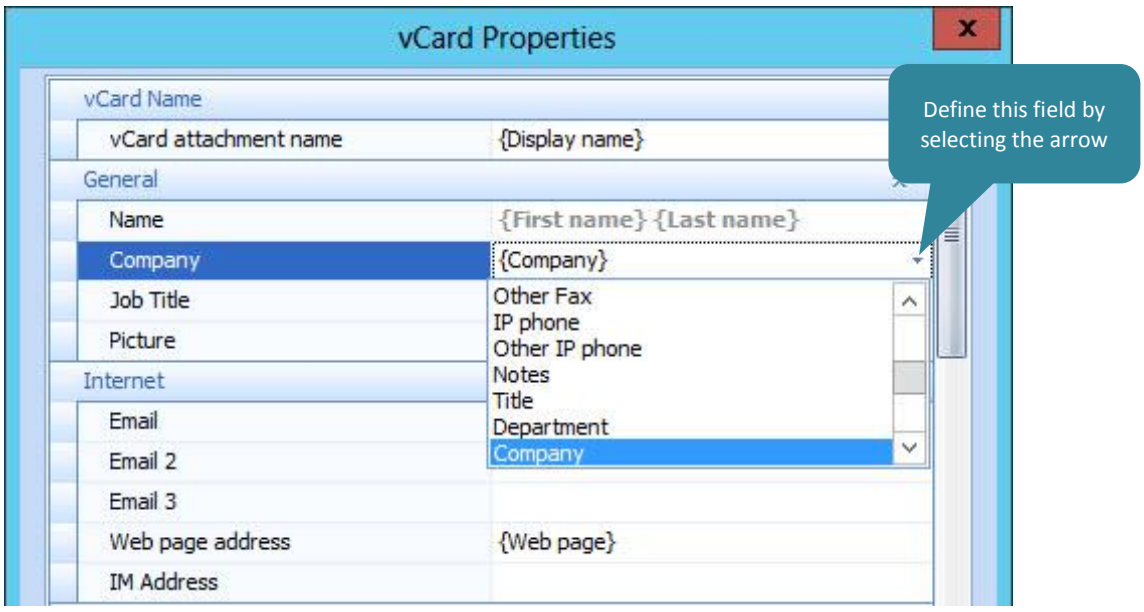
Properties are selected in different ways, depending on the nature of the field. For example, to update the name that is displayed on vCards, click anywhere in the right-hand field (to activate it):



Then, select the browse (...) button to choose which Active Directory fields associated with the sender's name should be used to form the name displayed on vCards:



Alternatively, other vCard details can be simply selected from a drop down list, as shown in the example below:

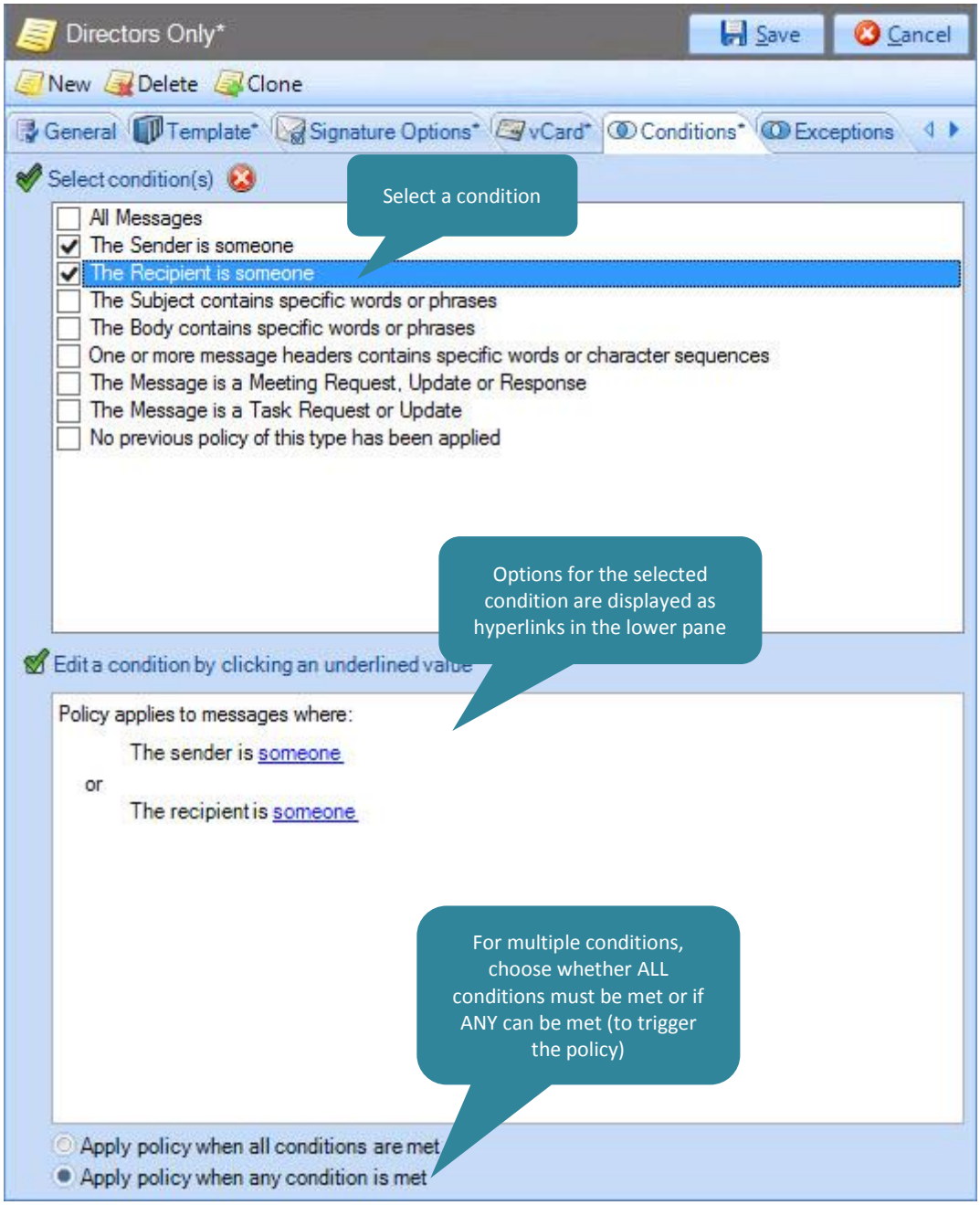


NOTE

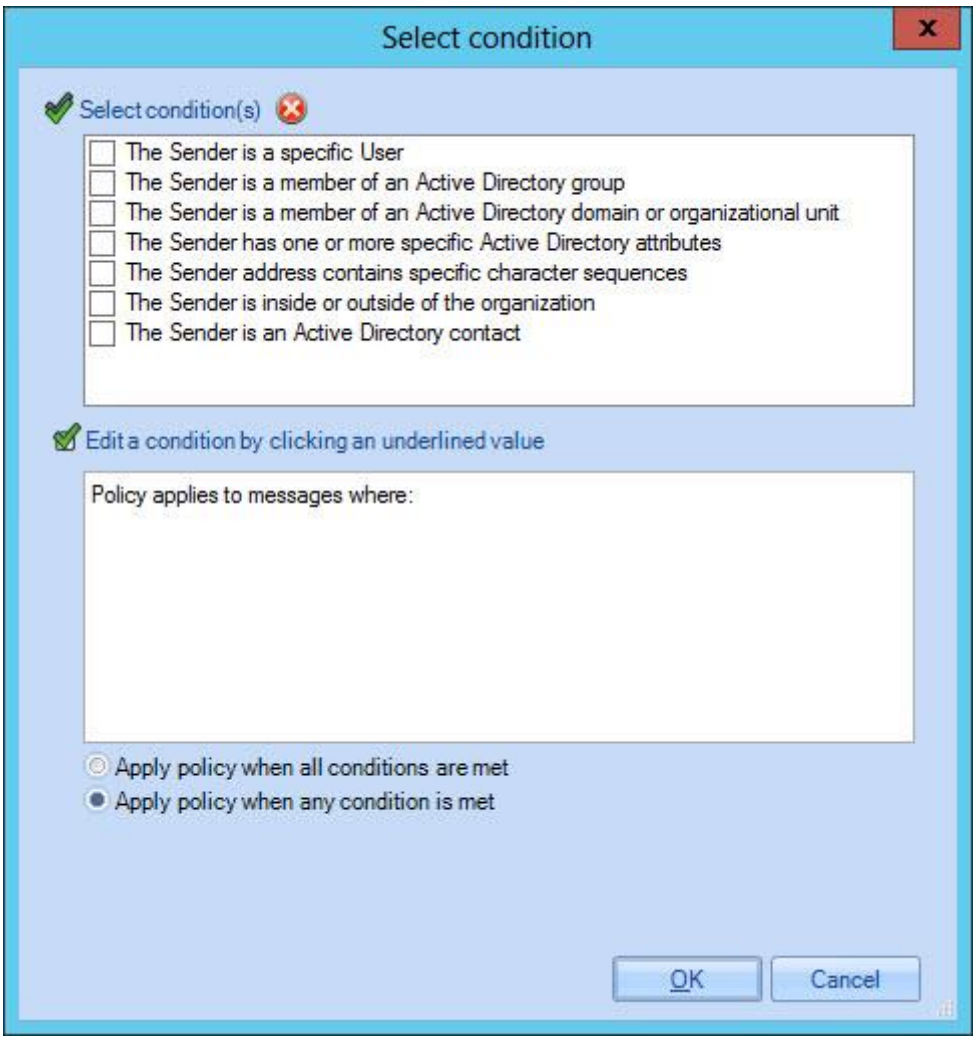
Any customizations will be used if this policy is applied (therefore you could apply different **vCard** settings for different situations, if required).

Conditions

The conditions tab is used to set criteria [pg.92] that determine the circumstances under which a signature is applied to messages:


Directors Only*
Save
Cancel
New
Delete
Clone
General
Template*
Signature Options*
vCard*
Conditions*
Exceptions
Select condition(s)
Select a condition
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Options for the selected condition are displayed as hyperlinks in the lower pane
Edit a condition by clicking an underlined value
Policy applies to messages where:
The sender is someone
or
The recipient is someone
For multiple conditions, choose whether ALL conditions must be met or if ANY can be met (to trigger the policy)
Apply policy when all conditions are met
Apply policy when any condition is met

Once a condition is selected, any options [pg.92] for that condition are displayed as hyperlinks in the lower pane - select these links to refine the condition. For instance, selecting the someone link in the example above displays further options to refine the recipient is someone condition:


Select condition
Select condition(s)
The Sender is a specific User
The Sender is a member of an Active Directory group
The Sender is a member of an Active Directory domain or organizational unit
The Sender has one or more specific Active Directory attributes
The Sender address contains specific character sequences
The Sender is inside or outside of the organization
The Sender is an Active Directory contact
Edit a condition by clicking an underlined value
Policy applies to messages where:
Apply policy when all conditions are met
Apply policy when any condition is met
OK
Cancel

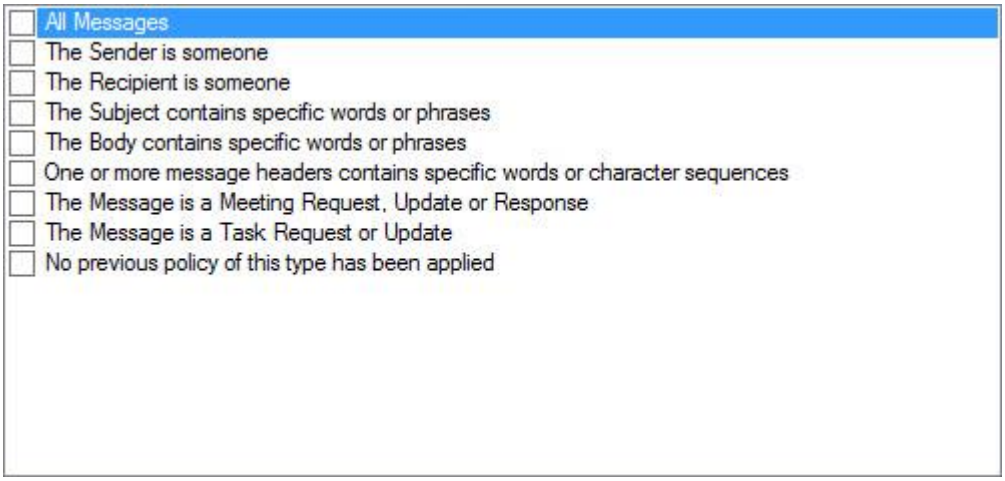
Each time a selection is made, confirmation of the selection and any further options [pg.92] are displayed in the lower pane.

NOTE

At least one condition must be set to apply signatures. If a condition is not selected, the default condition of **all messages** is used. See the conditions - options summary [pg.92] page for a summary of available conditions.

Available Options for Setting Conditions

When working with conditions [pg.90] for a policy, the following options are available:


All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied

When a condition is selected, further options are available, as summarized below:

All messages [pg.93]

The sender is someone [pg.93]

- The sender is a specific person [pg.94]
- The sender is a member of an Active Directory group [pg.94]
- The sender is a member of an Active Directory domain or organizational unit [pg.94]
- The sender has one or more specific Active Directory attributes [pg.94]
- The sender address contains specific character sequences [pg.94]
- The sender is inside or outside the organization [pg.94]
- The sender is an Active Directory contact [pg.94]

The recipient is someone [pg.95]

- The recipient is a specific person [pg.96]
- The recipient is a member of an Active Directory group [pg.96]
- The recipient is a member of an Active Directory domain or organizational unit [pg.96]
- The recipient has one or more specific Active Directory attributes [pg.96]
- The recipient address contains specific character sequences [pg.96]
- The recipient is inside or outside the organization [pg.96]
- The recipient is an Active Directory contact [pg.96]

The Recipient is in the To or Cc field of the message [pg.96]

The subject contains specific words or phrases [pg.97]

The body contains specific words or phrases [pg.98]

One or more message headers contains specific words or character sequences [pg.99]

The message is a meeting request, update or response [pg.99]

The message is a task request or update [pg.99]

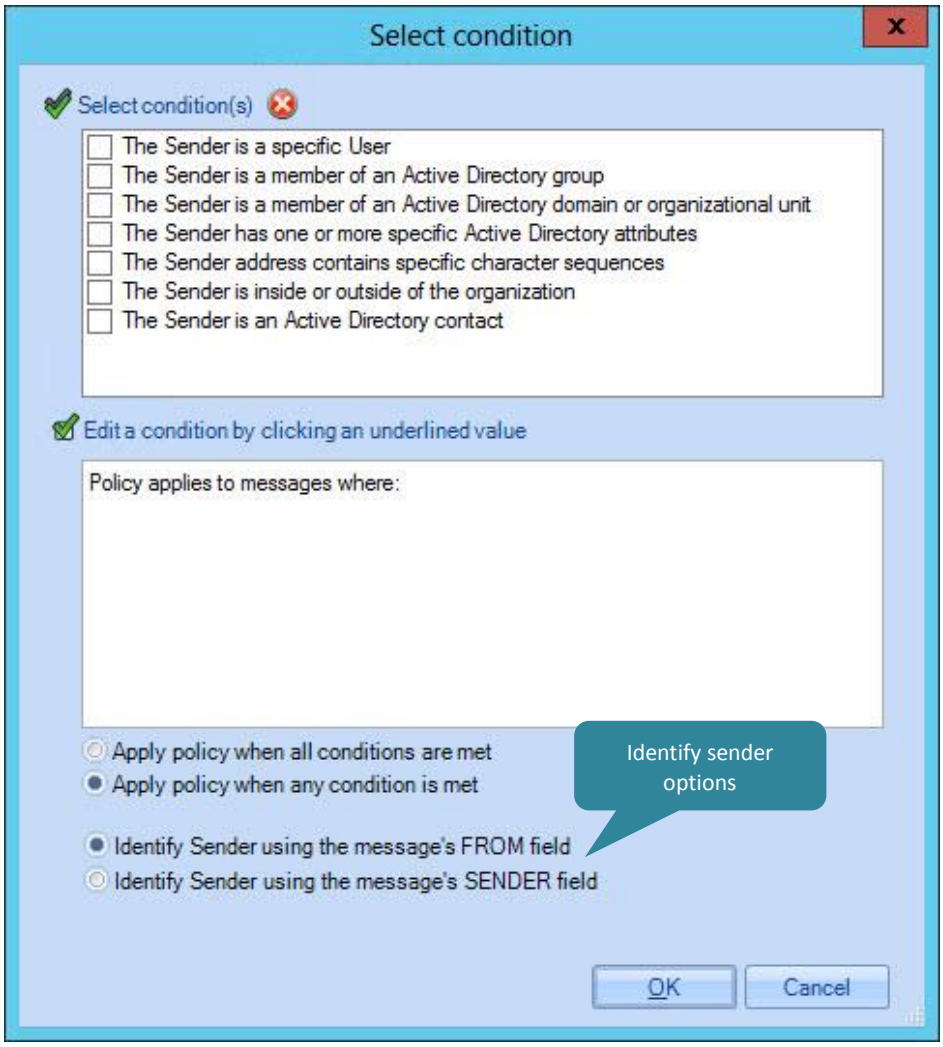
No previous policy of this type has been applied [pg.99]

All Messages

This is a blanket or 'wildcard' condition which will apply the signature to all messages.

The Sender Is Someone

When the sender is someone condition is selected, a someone link is displayed in the lower pane. Use this link to access further options:


Select condition
Select condition(s)
The Sender is a specific User
The Sender is a member of an Active Directory group
The Sender is a member of an Active Directory domain or organizational unit
The Sender has one or more specific Active Directory attributes
The Sender address contains specific character sequences
The Sender is inside or outside of the organization
The Sender is an Active Directory contact
Edit a condition by clicking an underlined value
Policy applies to messages where:
Apply policy when all conditions are met
Apply policy when any condition is met
Identify sender options
Identify Sender using the message's FROM field
Identify Sender using the message's SENDER field
OK
Cancel

These options are summarized in the following sections however, two additional identify sender options are available at the bottom of this window. These options can be used to handle cases where a user is delegated to send email messages on behalf of another user.

An example of this is where a PA (Jane Smith) has permission to send email messages on behalf of a Company Director (Alice Jones). When received, these messages would be shown as ' from Jane Smith on behalf of Alice Jones'. In this case, you would use identify sender options to control whether the policy is evaluated according to the PA or the Company Director.

Available options are:

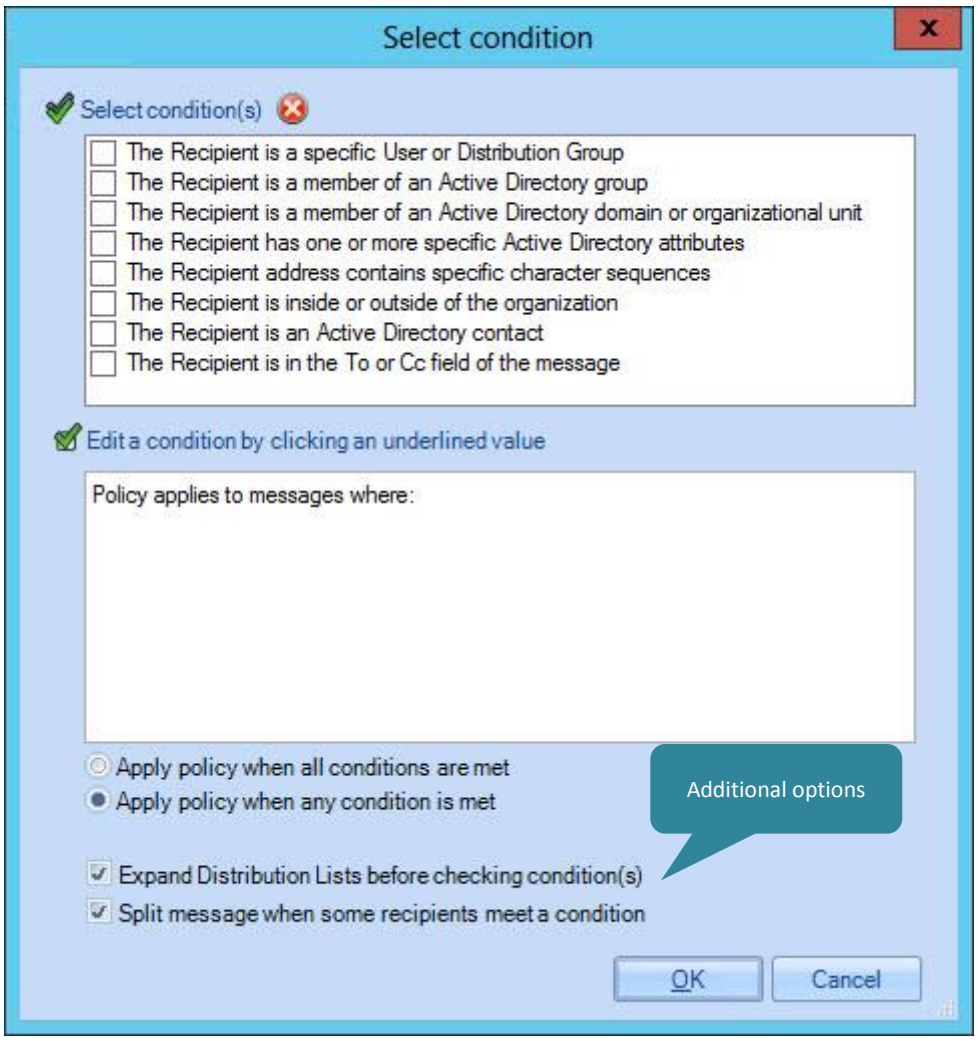
Option	Summary
Identify sender using the message's FROM field	If selected, the 'sender' will be considered to be the person in the from field of the email message - i.e. not necessarily the person who physically sent the message. Taking the example above, the policy would be evaluated against the Company Director, Alice Jones.
Identify sender using the message's SENDER field	If selected, the 'sender' will be considered to be the person who physically sent the email message - i.e. not necessarily the person that the recipient will see as the message being from. Taking the example above, the policy would be evaluated against the PA, Jane Smith.

The following options are available to determine your sender is someone criteria:

Option	Summary
The sender is a specific person	Use the list of users link to browse and select a user from the user list.
The sender is a member of an Active Directory group	Use the Active Directory group link to browse and select the required group from a list of Active Directory groups.
The sender is a member of an Active Directory domain or organizational unit	Use the domain or organizational unit link to browse and select the required domain or organizational unit from a container list.
The sender has one or more specific Active Directory attributes	Use the Active Directory attribute values link to open the configure attributes window [pg.100] to define queries to be resolved for matching.
The sender address contains specific character sequences	Use the character sequences link to define character sequences to be matched in the sender's email address.
The sender is inside or outside the organization	Use the inside link to match messages where the sender is either internal or external to the organization.
The sender is an Active Directory contact	Use the is link to match messages if the sender is or is not present in the Active Directory.

The Recipient Is Someone

When the recipient is someone condition is selected, a someone link is displayed in the lower pane. Use this link to access further options:


Select condition
Select condition(s)
The Recipient is a specific User or Distribution Group
The Recipient is a member of an Active Directory group
The Recipient is a member of an Active Directory domain or organizational unit
The Recipient has one or more specific Active Directory attributes
The Recipient address contains specific character sequences
The Recipient is inside or outside of the organization
The Recipient is an Active Directory contact
The Recipient is in the To or Cc field of the message
Edit a condition by clicking an underlined value
Policy applies to messages where:
Apply policy when all conditions are met
Apply policy when any condition is met
Additional options
Expand Distribution Lists before checking condition(s)
Split message when some recipients meet a condition
OK
Cancel

These options are summarized in the following sections however, two additional options are available at the bottom of this window:

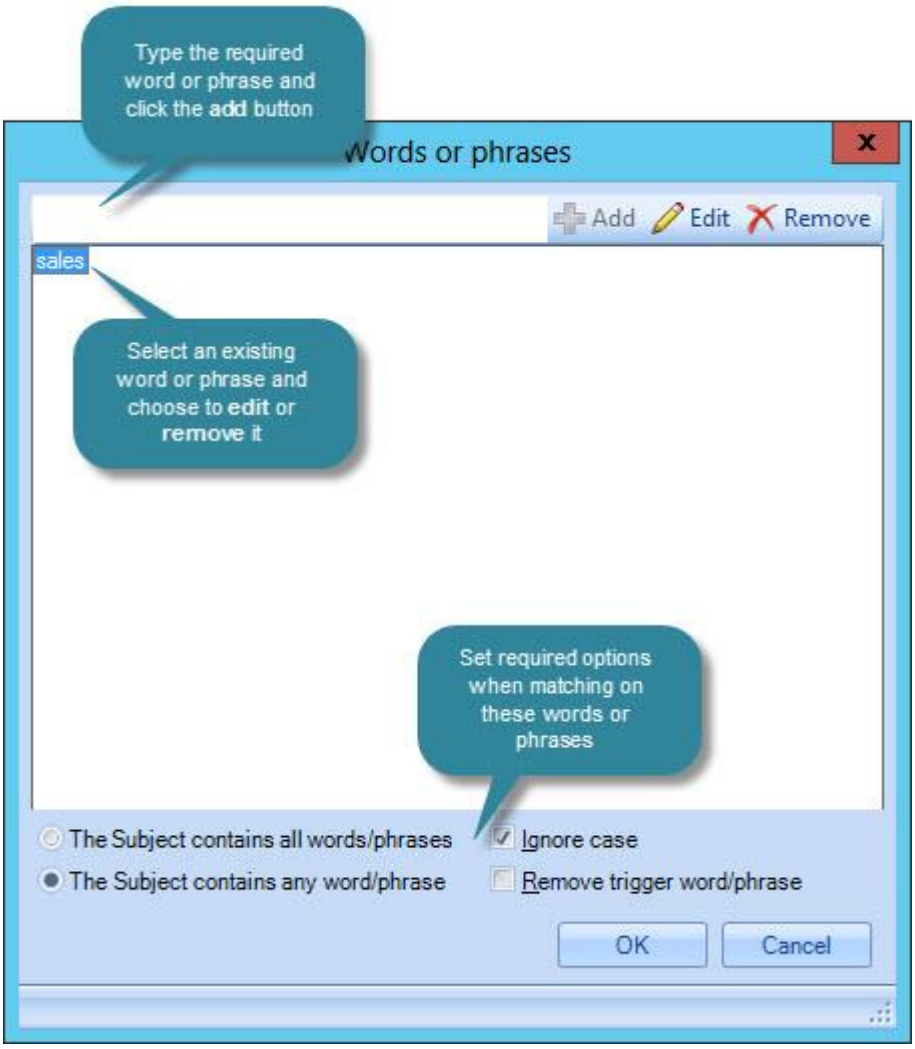
Option	Summary
Expand distribution lists before checking conditions	If selected, any distribution lists specified as recipients will be expanded and the conditions will be checked against the users within those lists instead of the list/group as a whole.
Split messages when some recipients meet a condition	This option handles cases where an email message is sent to multiple recipients and some but not all of those recipients match given conditions. If selected, the email message would be split so there are two copies - one for recipients who meet conditions and one for recipients who do not

The following options are available to refine your recipient is someone criteria:

Option	Summary
The recipient is a specific person	Use the list of users or distribution lists link to browse and select a user or distribution list from the user list.
The recipient is a member of an Active Directory group	Use the Active Directory group link to browse and select the required group from a list of Active Directory groups.
The recipient is a member of an Active Directory domain or organizational unit	Use the domain or organizational unit link to browse and select the required domain or organizational unit from a container list.
The recipient has one or more specific Active Directory attributes	Use the Active Directory attribute values link to open the configure attributes window [pg.100] to define queries to be resolved for matching.
The recipient address contains specific character sequences	Use the character sequences link to define character sequences to be matched in the sender's email address.
The recipient is inside or outside the organization	Use the inside link to match messages where the recipient is either internal or external to the organization.
The recipient is an Active Directory contact	Use the is link to match messages if the recipient is or is not present in the Active Directory.
The recipient is in the To or Cc field of the message	Use the to or cc field to match messages where the recipient is in the To or the Cc field of the email, or where the recipient is only in the to field, or where the recipient is only in the cc field.

The Subject Contains Specific Words or Phrases

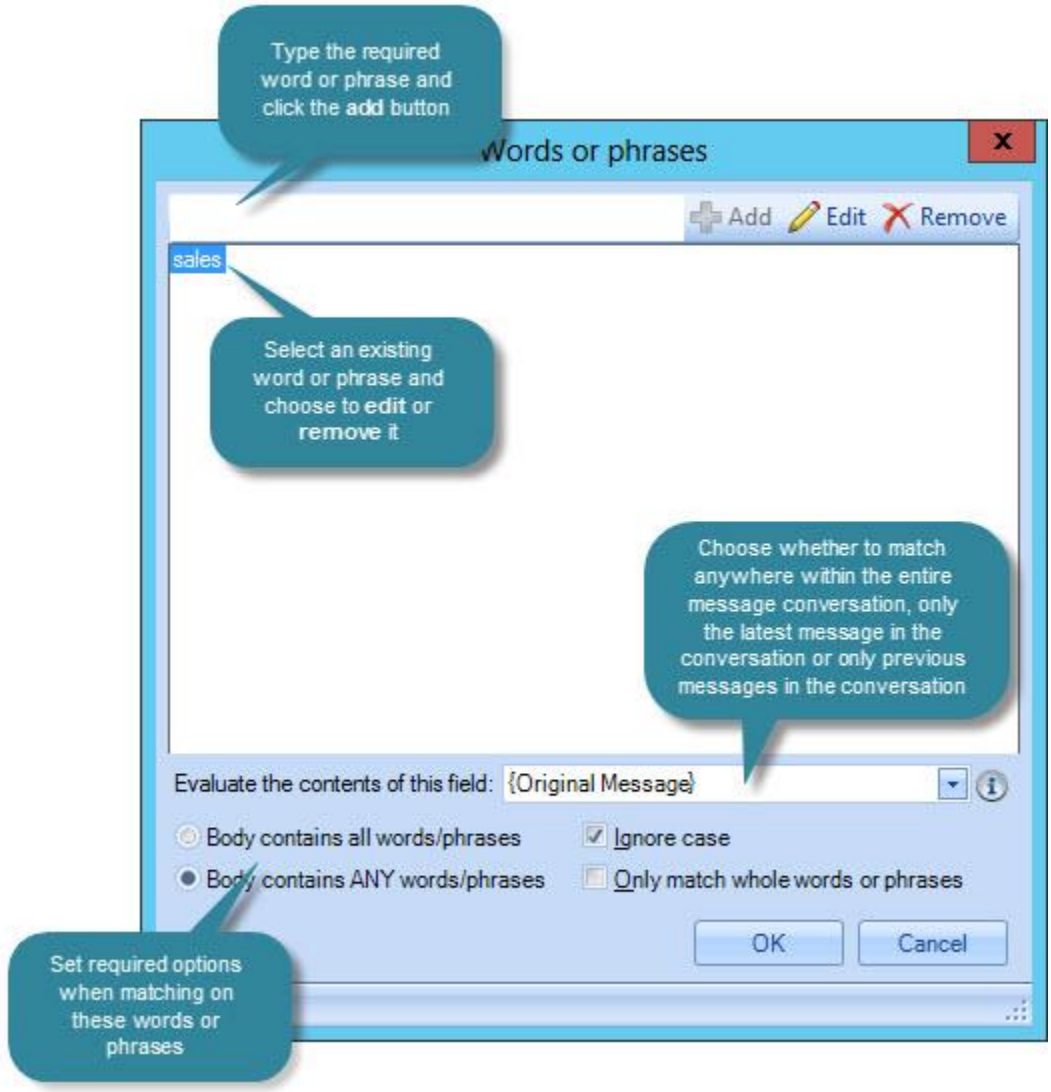
Use the words or phrases link to specify given words or phrases to be matched in the message subject line. Use the words or phrases window to enter required items to be matched:


Type the required word or phrase and click the add button
Words or phrases
Add
Edit
Remove
sales
Select an existing word or phrase and choose to edit or remove it
Set required options when matching on these words or phrases
The Subject contains all words/phrases
The Subject contains any word/phrase
Ignore case
Remove trigger word/phrase
OK
Cancel

If a single entry contains multiple words, it is considered to be a phrase. Use check boxes at the bottom of the window to choose whether matching should take place if any or all words/phrases are matched, and whether matching is case sensitive.

The Body Contains Specific Words or Phrases

Use the words or phrases link to specify given words or phrases to be matched in the message body. Use the words or phrases window to enter required items to be matched:


Type the required word or phrase and click the add button
Words or phrases
Add
Edit
Remove
sales
Select an existing word or phrase and choose to edit or remove it
Choose whether to match anywhere within the entire message conversation, only the latest message in the conversation or only previous messages in the conversation
Evaluate the contents of this field: {Original Message}
Body contains all words/phrases
Body contains ANY words/phrases
Ignore case
Only match whole words or phrases
OK
Cancel
Set required options when matching on these words or phrases

When matching words or phrases in the body of email messages, you can choose which aspects of the body to consider. Use the evaluate the contents of this field drop-down list to select:

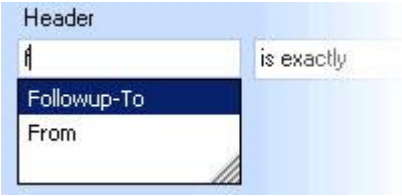
Option	Summary
Original message	Match specified words or phrases anywhere within the entire body of the message.
Original message above reply separator	Match specified words or phrases only within the latest message in the conversation.
Original message below reply	Match specified words or phrases only within previous messages in the conversation (excluding the latest one).

Typically, the original message will be used for most scenarios; however the alternative options may be required for more complex setups.

One or More Message Headers Contains Specific Words or Character Sequences

Match messages based on message header fields. Use message headers and words or character sequences links to enter header fields and values to be matched.

The header field uses intellisense for common message header fields, therefore it suggests an entry based on what you type. For example, if you type the letter 'T' into this field, the header 'To' is prompted., whereas if you type 'f' into the field, the ‘Followup-To' and 'From' headers are prompted:



The Message is a Meeting Request, Update or Response

Match messages if they are a meeting request, an updated meeting request, or a response to a meeting request.

The Message is a Task Request or Update

Match messages if they are a task request or an update to a task request.

No Previous Policy of This Type Has Been Applied

Use this is a 'catch all' condition. This is commonly used as the condition for a final policy in a policy chain [pg.127], to apply a signature to messages where no previous policy was applied.

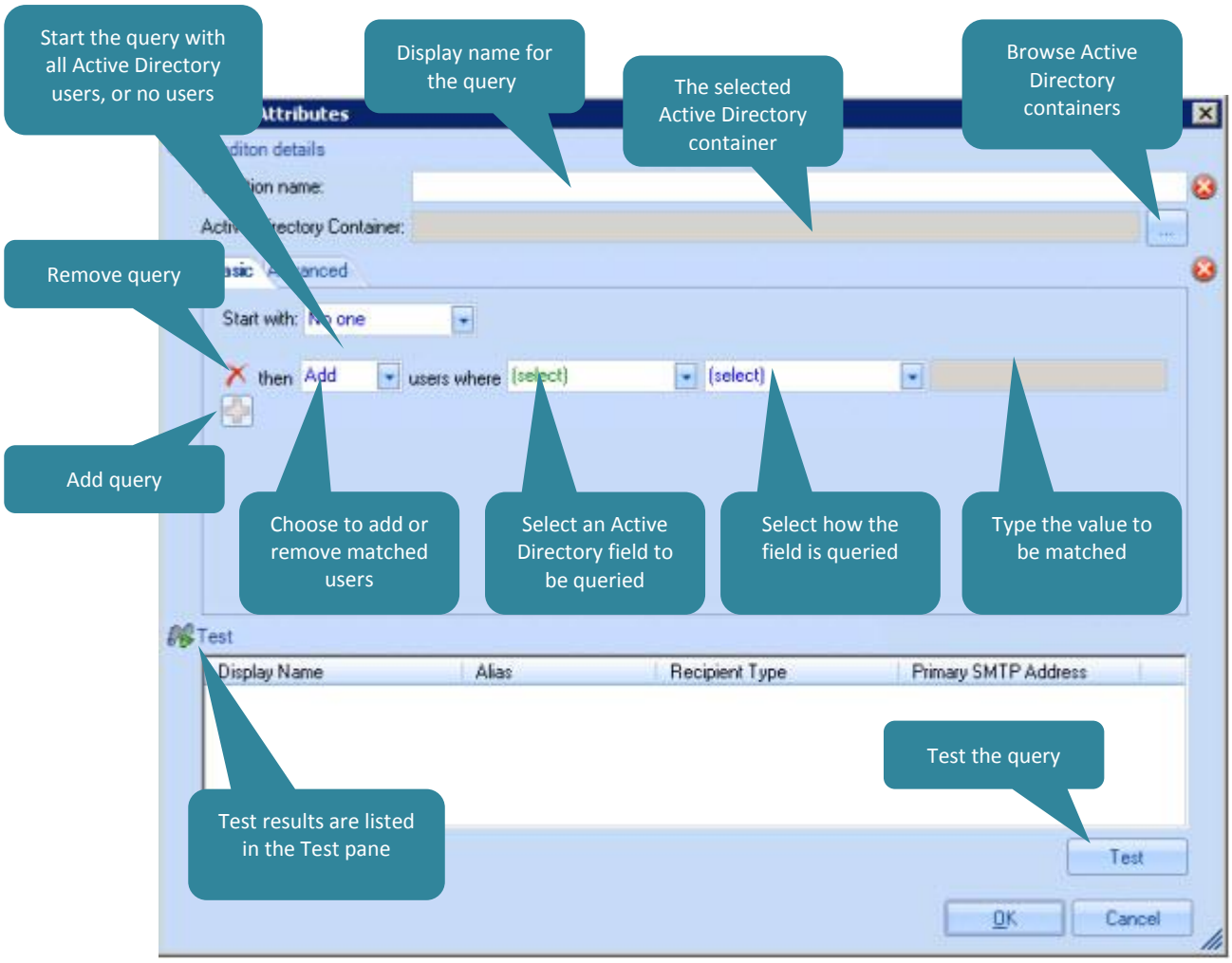
NOTE

At least one condition must be set to apply signatures. If a condition is not selected, the default condition of all messages is used.

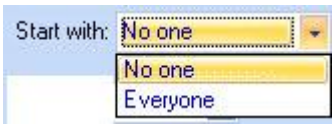
Creating Queries With the Configure Attributes Window

The configure attributes window allows you to define conditions [pg.90] and exceptions [pg.102] based on queries that are run on Active Directory user attributes - for example, you might want to define a policy to match all users within a given department, or a specific country, or with a certain manager.

With Exclaimer Signature Manager Exchange Edition, you can define queries based on the full range of Active Directory attributes. The configure attributes window is opened when defining a condition [pg.90] or an exception [pg.102] using the sender/recipient is someone and then the sender/recipient has one or more specific Active Directory attributes options:



Options shown here are summarized below:

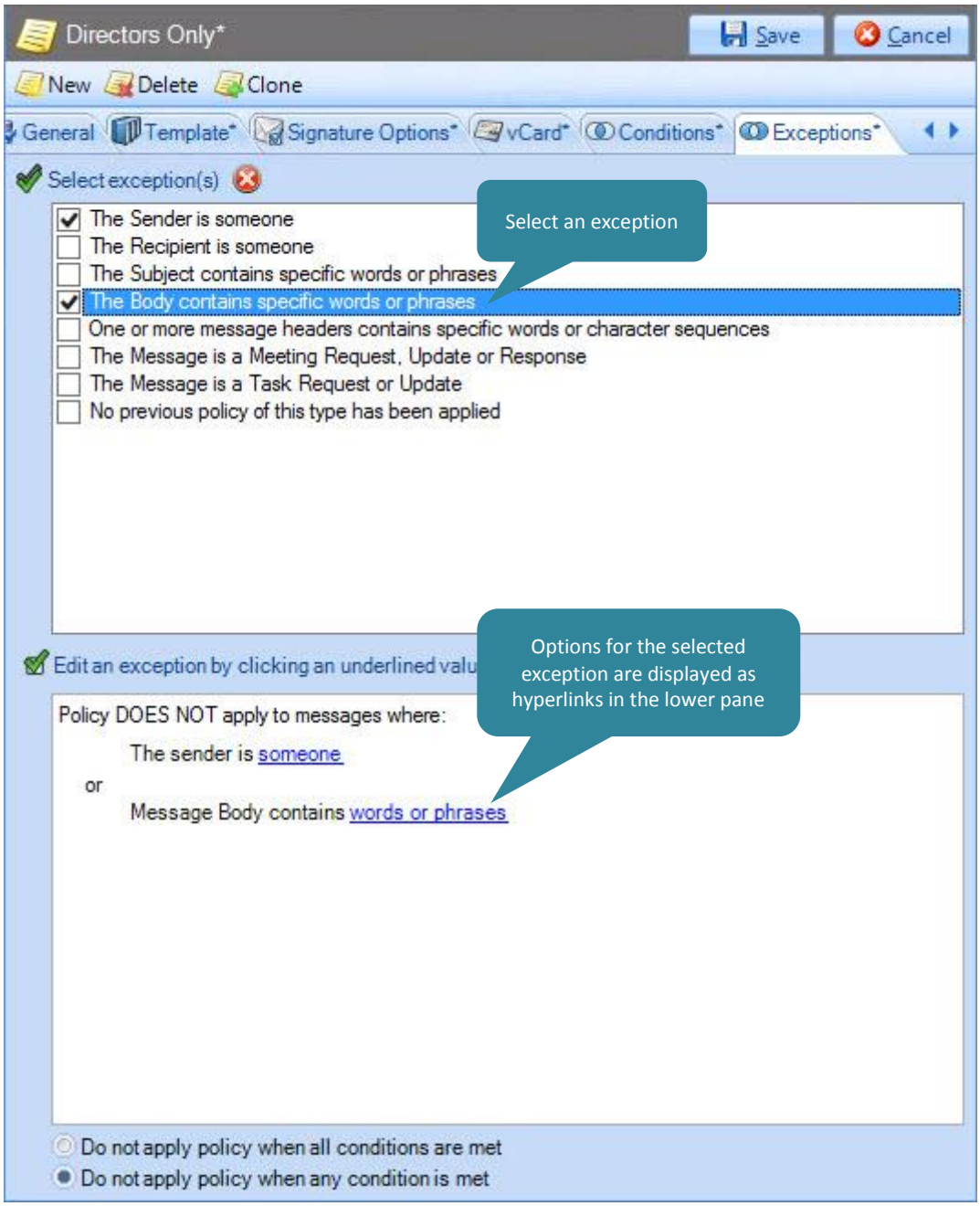
Field	Summary
Condition name	Enter a name for this query. This name is displayed in the main condition/exception window: It is advisable to specify a name that summarizes the purpose of the query. If you have multiple administrators, you might also choose to add version change dates here.
Active Directory container	Use the browse button to select an Active Directory container, or leave blank to search the entire Active Directory.
Start with	Choose to start the query with no one (so the query will start with nothing and add matched users) or everyone (so the query will start with all Active Directory users and remove matched users): 
	Use this icon to remove a query line.
	Use this icon to add a new query line.
then...	Choose to add or remove matched users: Defaults to add if you have chosen to start with no one and remove if you have chosen to start with everyone.
users where...	Select the Active Directory field to be queried, then how it should be queried (equal to, does not equal, starts with, ends with, etc.) and finally enter a value to be matched against.
Test	Use the test option to run the query and view matched users in the test pane.

NOTE

See how do I create a policy based on specific Active Directory attributes? [pg.138] for a working example of a policy based on an attribute query.

Exceptions

Exceptions are used to specify any exceptions to conditions [pg.90] which have been set. For example, if you have defined a condition to match everyone within a given department, you might define an exception to exclude individual people within that department. Use the exceptions tab to set required criteria [pg.103]:

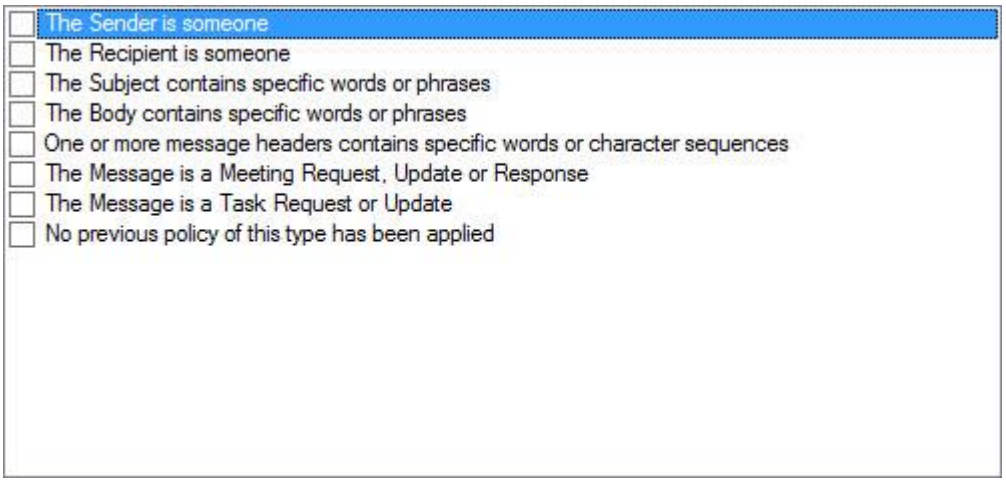

Directors Only*
Save
Cancel
New
Delete
Clone
General
Template*
Signature Options*
vCard*
Conditions*
Exceptions*
Select exception(s)
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Select an exception
Edit an exception by clicking an underlined valu
Options for the selected exception are displayed as hyperlinks in the lower pane
Policy DOES NOT apply to messages where:
The sender is someone
or
Message Body contains words or phrases
Do not apply policy when all conditions are met
Do not apply policy when any condition is met

Once an exception is selected, any options [pg.103] for that exception are displayed as hyperlinks in the lower pane - select these links to refine the exception. For instance, selecting the someone link in the example above displays further options to refine the sender is someone exception.

Each time a selection is made, confirmation of the selection and any further options [pg.103] are displayed in the lower pane. See the exceptions - options summary [pg.103] page for a summary of available exceptions.

Available Options for Setting Exceptions

When working with exceptions [pg.102] for a policy, the following options are available:


The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied

When an exception is selected, further options are available, as summarized below:

The sender is someone [pg.105]

- The sender is a specific person [pg.106]
- The sender is a member of an Active Directory group [pg.106]
- The sender is a member of an Active Directory domain or organizational unit [pg.106]
- The sender has one or more specific Active Directory attributes [pg.106]
- The sender address contains specific character sequences [pg.106]
- The sender is inside or outside the organization [pg.106]
- The sender is an Active Directory contact [pg.106]

The recipient is someone [pg.107]

- The recipient is a specific person [pg.108]
- The recipient is a member of an Active Directory group [pg.108]
- The recipient is a member of an Active Directory domain or organizational unit [pg.108]

The recipient has one or more specific Active Directory attributes [pg.108]

The recipient address contains specific character sequences [pg.108]

The recipient is inside or outside the organization [pg.108]

The recipient is an Active Directory contact [pg.108]

The recipient is in the To or Cc field of the message [pg.108]

The subject contains specific words or phrases [pg.109]

The body contains specific words or phrases [pg.110]

One or more message headers contains specific words or character sequences [pg.111]

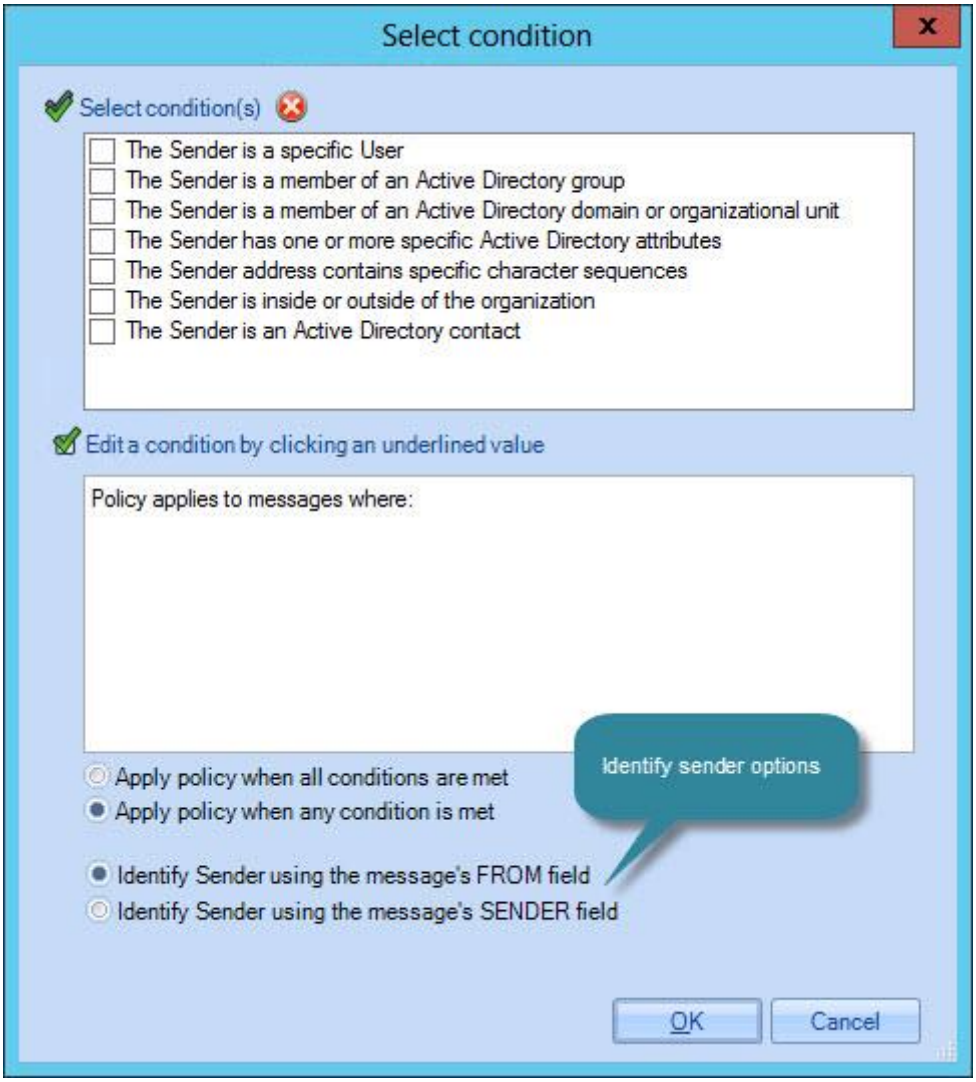
The message is a meeting request, update or response [pg.111]

The message is a task request or update [pg.111]

No previous policy of this type has been applied [pg.111]

The Sender Is Someone

When the sender is someone exception is selected, a someone link is displayed in the lower pane. Use this link to access further options:


Select condition
Select condition(s)
The Sender is a specific User
The Sender is a member of an Active Directory group
The Sender is a member of an Active Directory domain or organizational unit
The Sender has one or more specific Active Directory attributes
The Sender address contains specific character sequences
The Sender is inside or outside of the organization
The Sender is an Active Directory contact
Edit a condition by clicking an underlined value
Policy applies to messages where:
Identify sender options
Apply policy when all conditions are met
Apply policy when any condition is met
Identify Sender using the message's FROM field
Identify Sender using the message's SENDER field
OK
Cancel

These options are summarized in the following sections however, two additional identify sender options are available at the bottom of this window. These options can be used to handle cases where a user is delegated to send email messages on behalf of another user.

An example of this is where a PA (Jane Smith) has permission to send email messages on behalf of a Company Director (Alice Jones). When received, these messages would be shown as ' from Jane Smith on behalf of Alice Jones'. In this case, you would use identify sender options to control whether the policy is evaluated according to the PA or the Company Director.

Available options are:

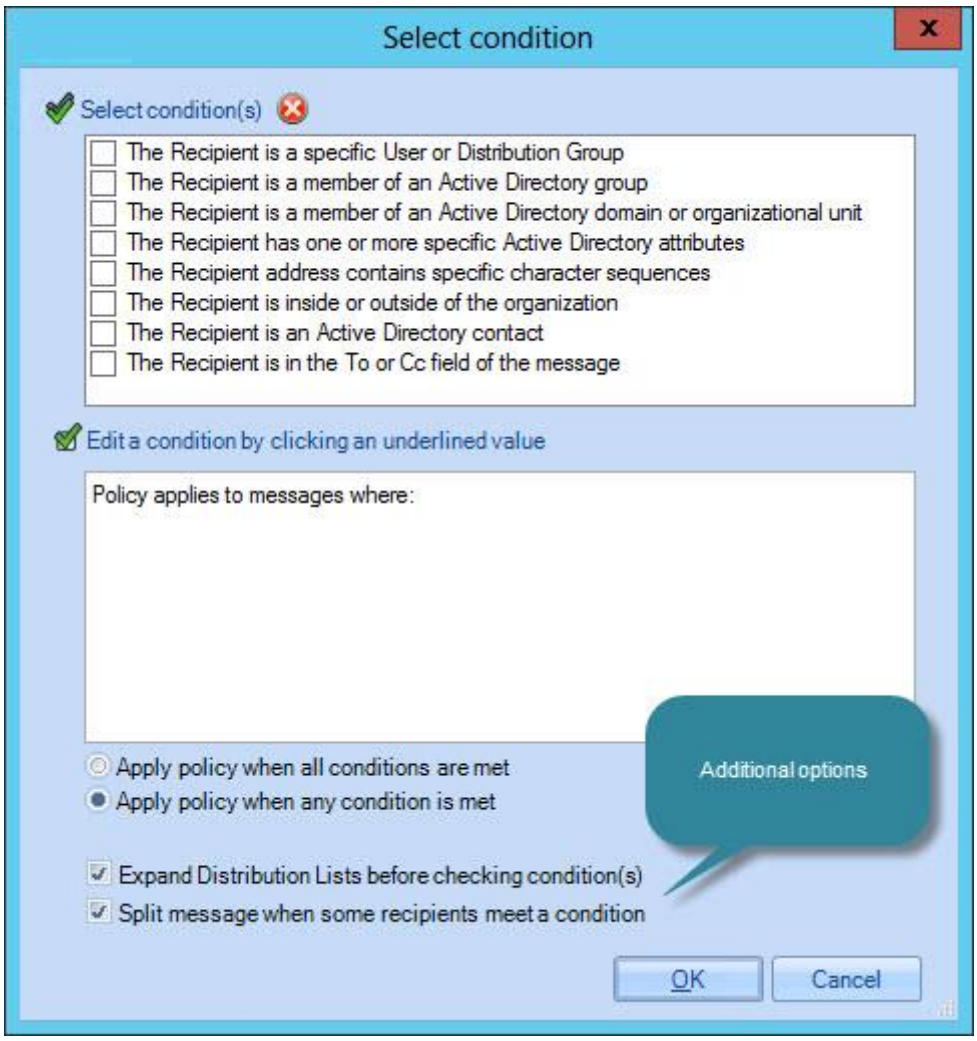
Option	Summary
Identify sender using the message's FROM field	If selected, the 'sender' will be considered to be the person in the from field of the email message - i.e. not necessarily the person who physically sent the message. Taking the example above, the policy would be evaluated against the Company Director, Alice Jones.
Identify sender using the message's SENDER field	If selected, the 'sender' will be considered to be the person who physically sent the email message - i.e. not necessarily the person that the recipient will see as the message being from. Taking the example above, the policy would be evaluated against the PA, Jane Smith.

The following options are available to determine your sender is someone criteria:

Option	Summary
The sender is a specific person	Use the list of users link to browse and select a user from the user list.
The sender is a member of an Active Directory group	Use the Active Directory group link to browse and select the required group from a list of Active Directory groups.
The sender is a member of an Active Directory domain or organizational unit	Use the domain or organizational unit link to browse and select the required domain or organizational unit from a container list.
The sender has one or more specific Active Directory attributes	Use the Active Directory attribute values link to open the configure attributes window [pg.100] to define queries to be resolved for matching.
The sender address contains specific character sequences	Use the character sequences link to define character sequences to be matched in the sender's email address.
The sender is inside or outside the organization	Use the inside link to match messages where the sender is either internal or external to the organization.
The sender is an Active Directory contact	Use the is link to match messages if the sender is or is not present in the Active Directory.

The Recipient Is Someone

When the recipient is someone exception is selected, a someone link is displayed in the lower pane. Use this link to access further options:


Select condition
Select condition(s)
The Recipient is a specific User or Distribution Group
The Recipient is a member of an Active Directory group
The Recipient is a member of an Active Directory domain or organizational unit
The Recipient has one or more specific Active Directory attributes
The Recipient address contains specific character sequences
The Recipient is inside or outside of the organization
The Recipient is an Active Directory contact
The Recipient is in the To or Cc field of the message
Edit a condition by clicking an underlined value
Policy applies to messages where:
Apply policy when all conditions are met
Apply policy when any condition is met
Additional options
Expand Distribution Lists before checking condition(s)
Split message when some recipients meet a condition
OK
Cancel

Recipient options are summarized in the following sections however, two additional options are available at the bottom of this window:

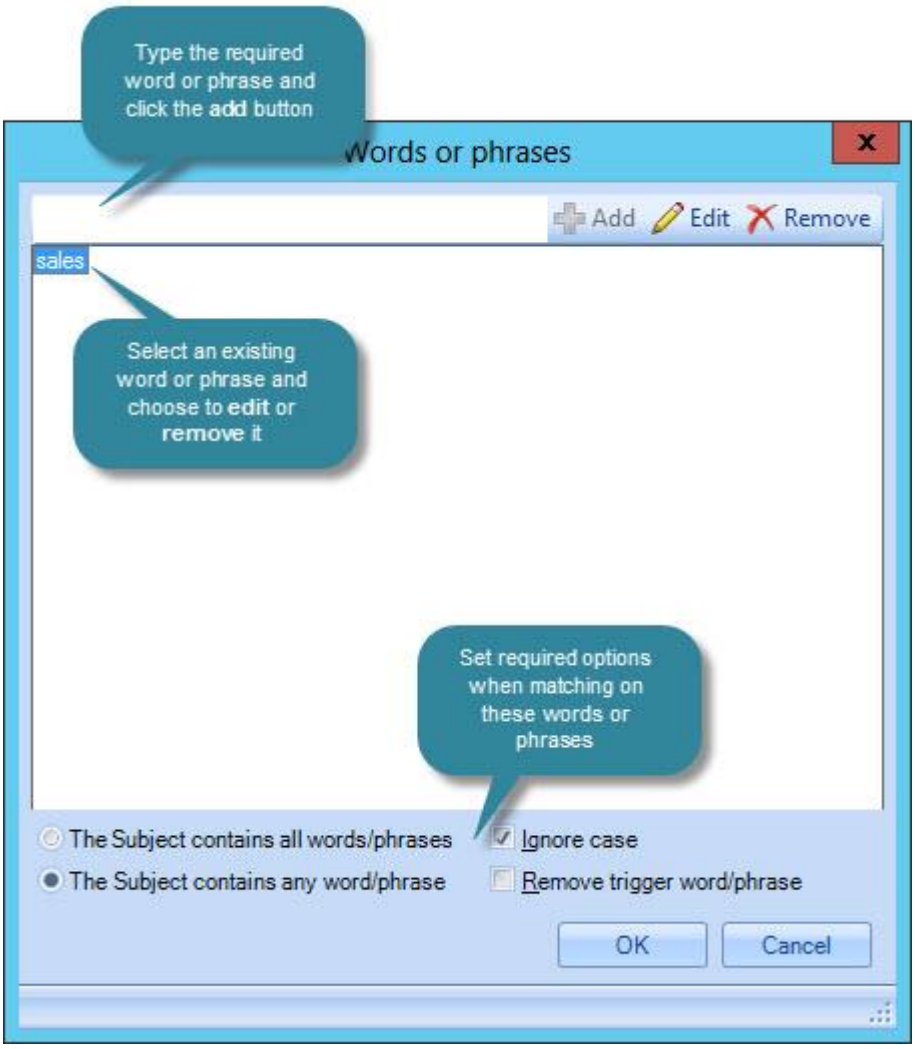
Option	Summary
Expand distribution lists before checking conditions	If selected, any distribution lists specified as recipients will be expanded and the exceptions will be checked against the users within those lists instead of the list/group as a whole.
Split messages when some recipients meet a condition	This option handles cases where an email message is sent to multiple recipients and some but not all of those recipients match given exceptions. If selected, the email message would be split so there are two copies - one for recipients who match exceptions and one for recipients who do not.

The following options are available to refine your recipient is someone criteria:

Option	Summary
The recipient is a specific person	Use the list of users or distribution lists link to browse and select a user or distribution list from the user list.
The recipient is a member of an Active Directory group	Use the Active Directory group link to browse and select the required group from a list of Active Directory groups.
The recipient is a member of an Active Directory domain or organizational unit	Use the domain or organizational unit link to browse and select the required domain or organizational unit from a container list.
The recipient has one or more specific Active Directory attributes	Use the Active Directory attribute values link to open the configure attributes window [pg.100] to define queries to be resolved for matching.
The recipient address contains specific character sequences	Use the character sequences link to define character sequences to be matched in the sender's email address.
The recipient is inside or outside the organization	Use the inside link to match messages where the recipient is either internal or external to the organization.
The recipient is an Active Directory contact	Use the is link to match messages if the recipient is or is not present in the Active Directory.
The recipient is in the To or Cc field of the message	Use the to or cc field to match messages where the recipient is in the To or the Cc field of the email, or where the recipient is only in the to field, or where the recipient is only in the cc field.

The Subject Contains Specific Words or Phrases

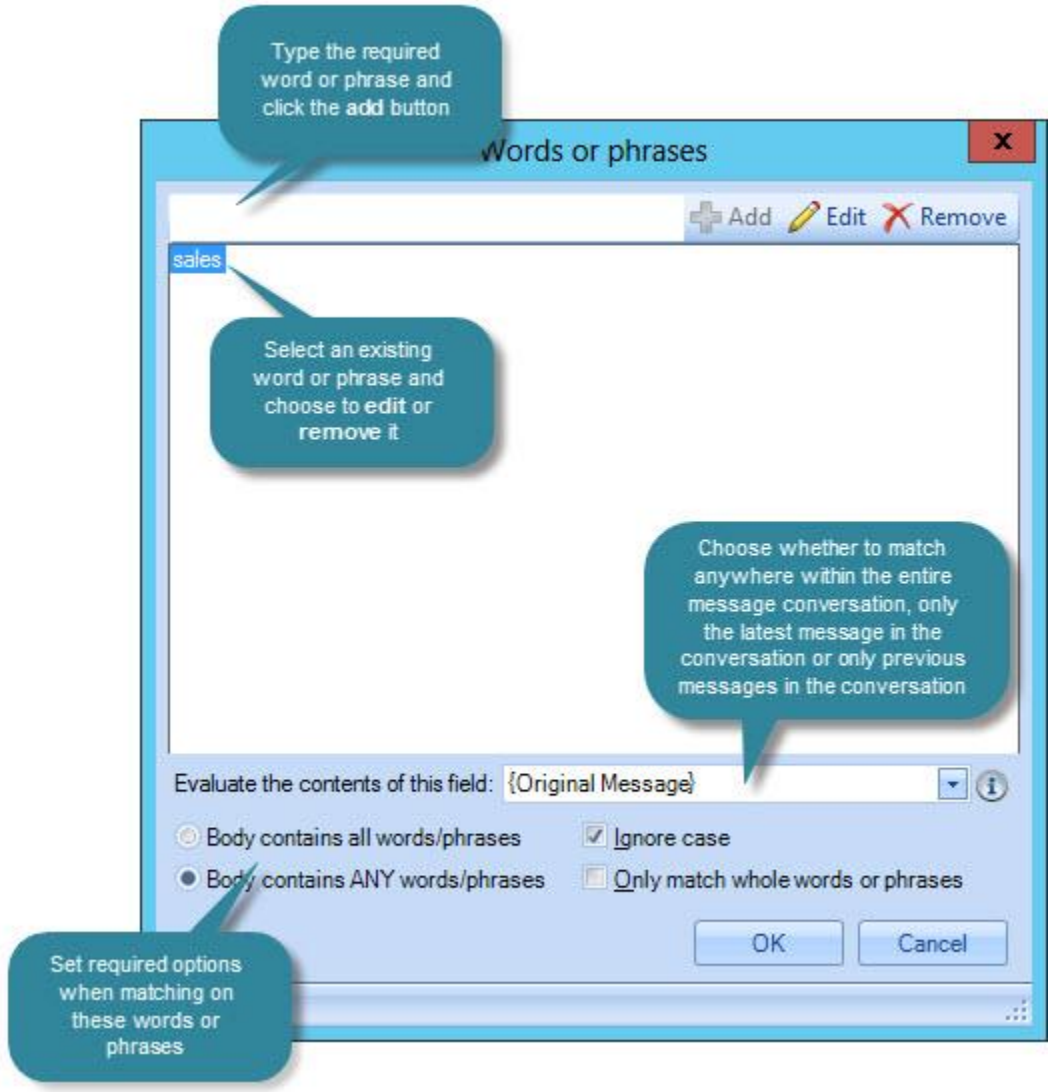
Use the words or phrases link to specify given words or phrases to be matched in the message subject line. Use the words or phrases window to enter required items to be matched:


Type the required word or phrase and click the add button
Words or phrases
Add
Edit
Remove
sales
Select an existing word or phrase and choose to edit or remove it
Set required options when matching on these words or phrases
The Subject contains all words/phrases
The Subject contains any word/phrase
Ignore case
Remove trigger word/phrase
OK
Cancel

If a single entry contains multiple words, it is considered to be a phrase. Use check boxes at the bottom of the window to choose whether matching should take place if any or all words/phrases are matched, and whether matching is case sensitive.

The Body Contains Specific Words or Phrases

Use the words or phrases link to specify given words or phrases to be matched in the message body. Use the words or phrases window to enter required items to be matched:


Type the required word or phrase and click the add button
Words or phrases
Add
Edit
Remove
sales
Select an existing word or phrase and choose to edit or remove it
Choose whether to match anywhere within the entire message conversation, only the latest message in the conversation or only previous messages in the conversation
Evaluate the contents of this field:
{Original Message}
Body contains all words/phrases
Body contains ANY words/phrases
Ignore case
Only match whole words or phrases
OK
Cancel
Set required options when matching on these words or phrases

When matching words or phrases in the body of email messages, you can choose which aspects of the body to consider. Use the evaluate the contents of this field drop-down list to select:

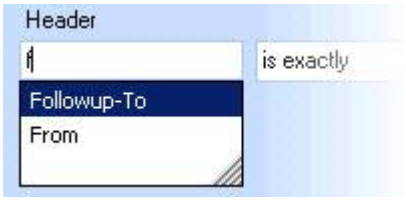
Option	Summary
Original message	Match specified words or phrases anywhere within the entire body of the message.
Original message above reply separator	Match specified words or phrases only within the latest message in the conversation.
Original message below reply	Match specified words or phrases only within previous messages in the conversation (excluding the latest one).

Typically, the original message will be used for most scenarios; however the alternative options may be required for more complex setups.

One or More Message Headers Contains Specific Words or Character Sequences

Match messages based on message header fields. Use message headers and words or character sequences links to enter header fields and values to be matched.

The header field uses intellisense for common message header fields, therefore it suggests an entry based on what you type. For example, if you type the letter 'T' into this field, the header 'To' is prompted., whereas if you type 'f' into the field, the 'Followup-To' and 'From' headers are prompted:



The Message is a Meeting Request, Update or Response

Match messages if they are a meeting request, an updated meeting request, or a response to a meeting request.

The Message is a Task Request or Update

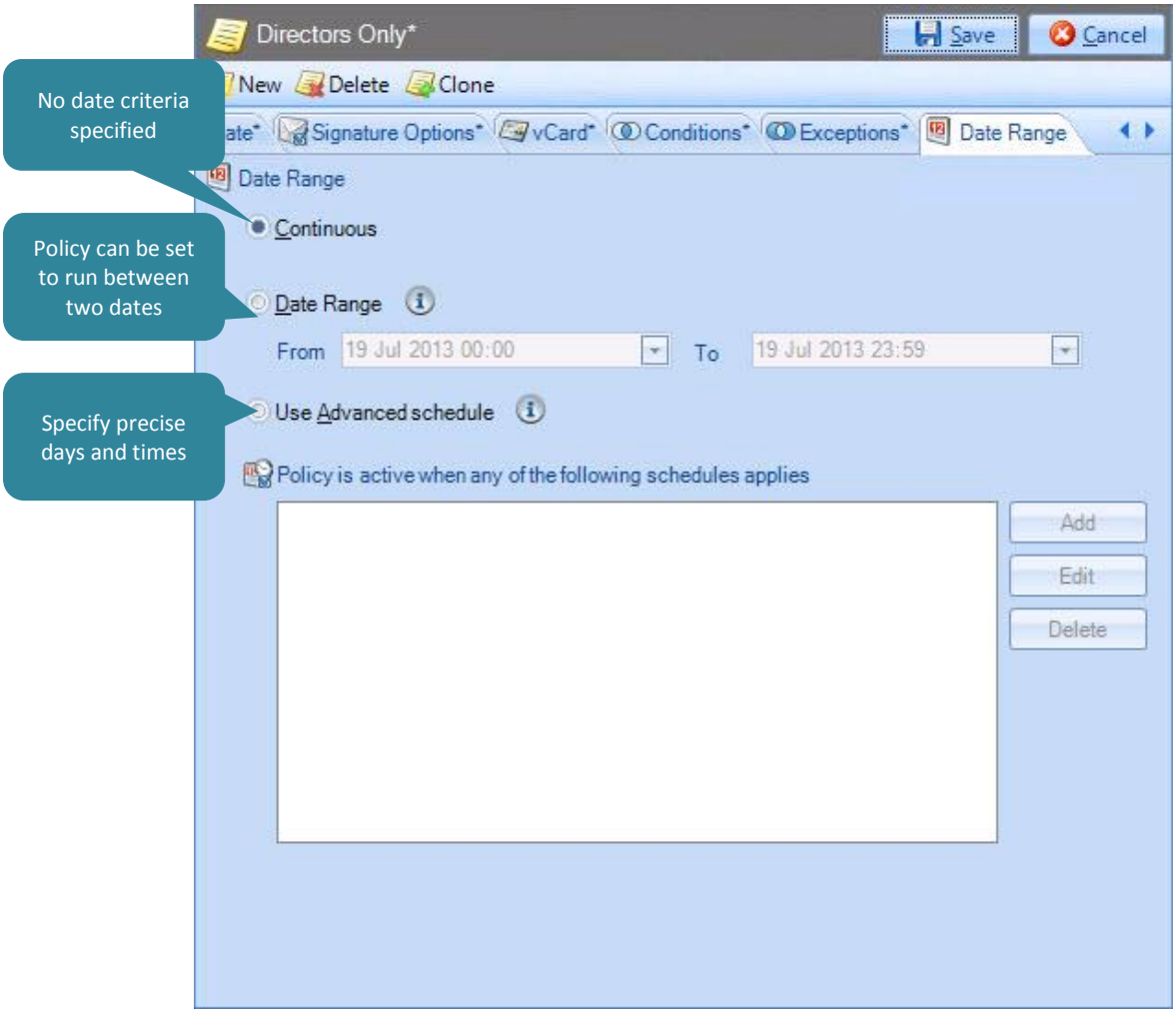
Match messages if they are a task request or an update to a task request.

No Previous Policy of This Type Has Been Applied

Use this as a 'catch all' condition. This is commonly used as the condition for a final policy in a policy chain [pg.127], to apply a signature to messages where no previous policy was applied.

Date Range

Options on the date range tab are used to set any date / time limitations for a policy:

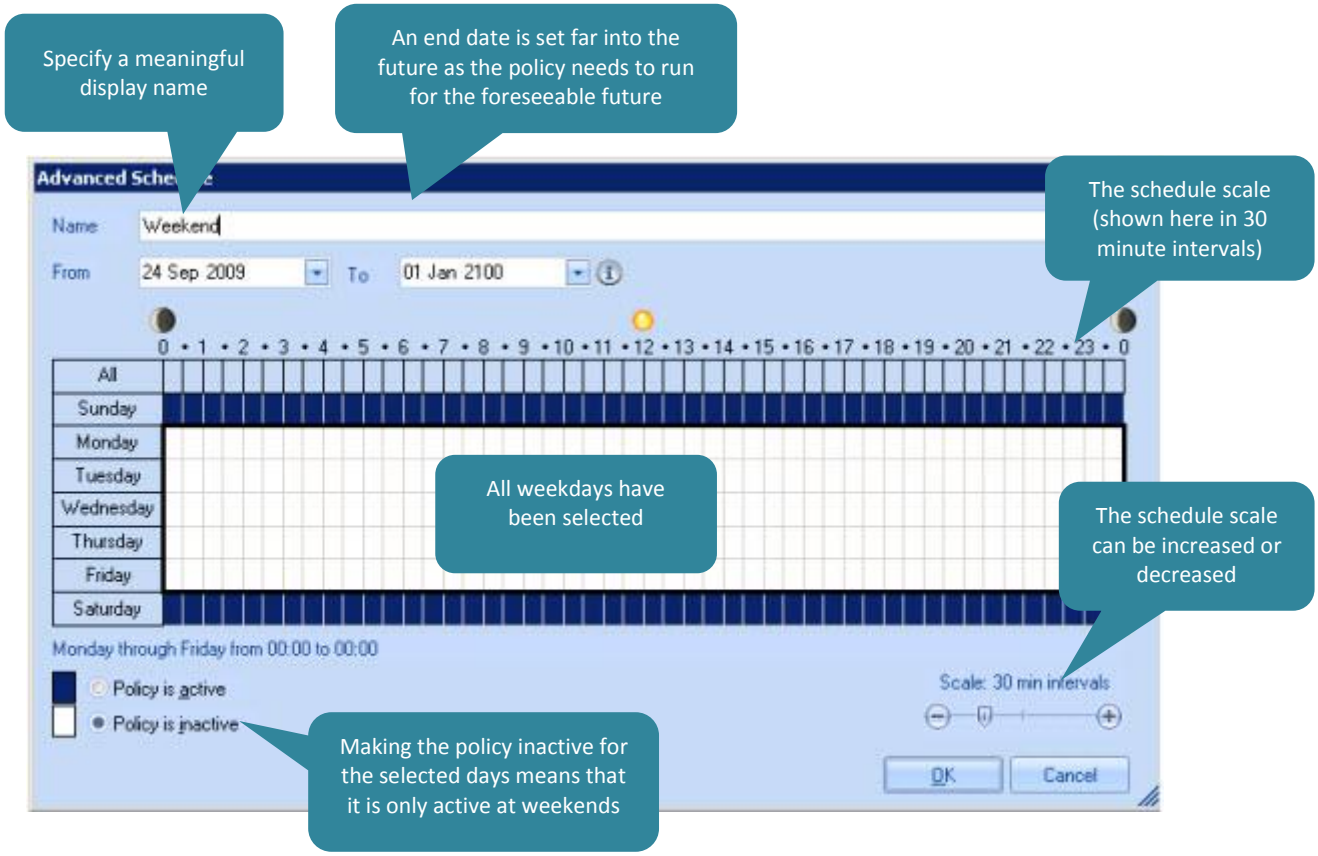


By default, the date range tab is set to continuous, which means that there are no date or time restrictions associated with the policy. Alternatively, specific to and from dates can be set so that the policy has a start/end time, or a detailed schedule can be set.

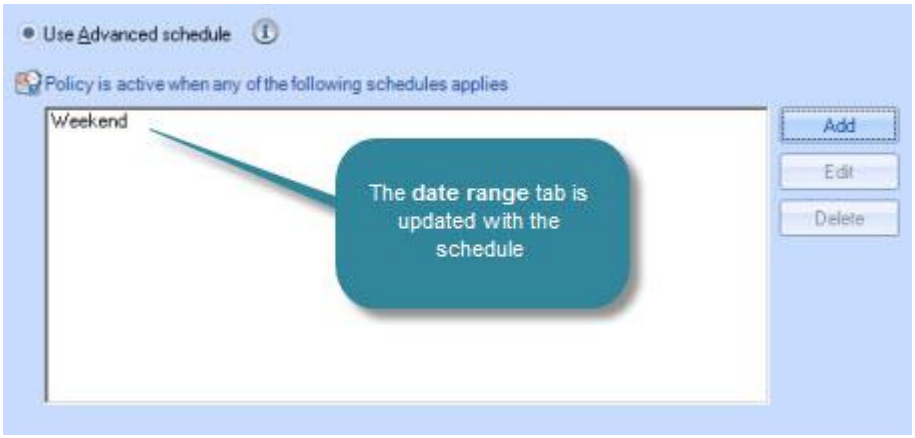
Using the advanced schedule

The advanced schedule works by selecting days of the week that the policy is active or inactive. Each day is split into time intervals, which can be adjusted using a sliding scale at the bottom of the window; this means that policies can be set to run on precise days at precise times.

To use the advanced schedule, click the use advanced schedule radio button and then click add. The example below shows how the schedule is used to create a policy that is only active at weekends:


Specify a meaningful display name
An end date is set far into the future as the policy needs to run for the foreseeable future
Advanced Sche
Name
Weekend
From
24 Sep 2009
To
01 Jan 2100
The schedule scale (shown here in 30 minute intervals)
0 • 1 • 2 • 3 • 4 • 5 • 6 • 7 • 8 • 9 • 10 • 11 • 12 • 13 • 14 • 15 • 16 • 17 • 18 • 19 • 20 • 21 • 22 • 23 • 0
All
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
All weekdays have been selected
The schedule scale can be increased or decreased
Monday through Friday from 00:00 to 00:00
Policy is active
Policy is inactive
Scale: 30 min intervals
Making the policy inactive for the selected days means that it is only active at weekends
OK
Cancel

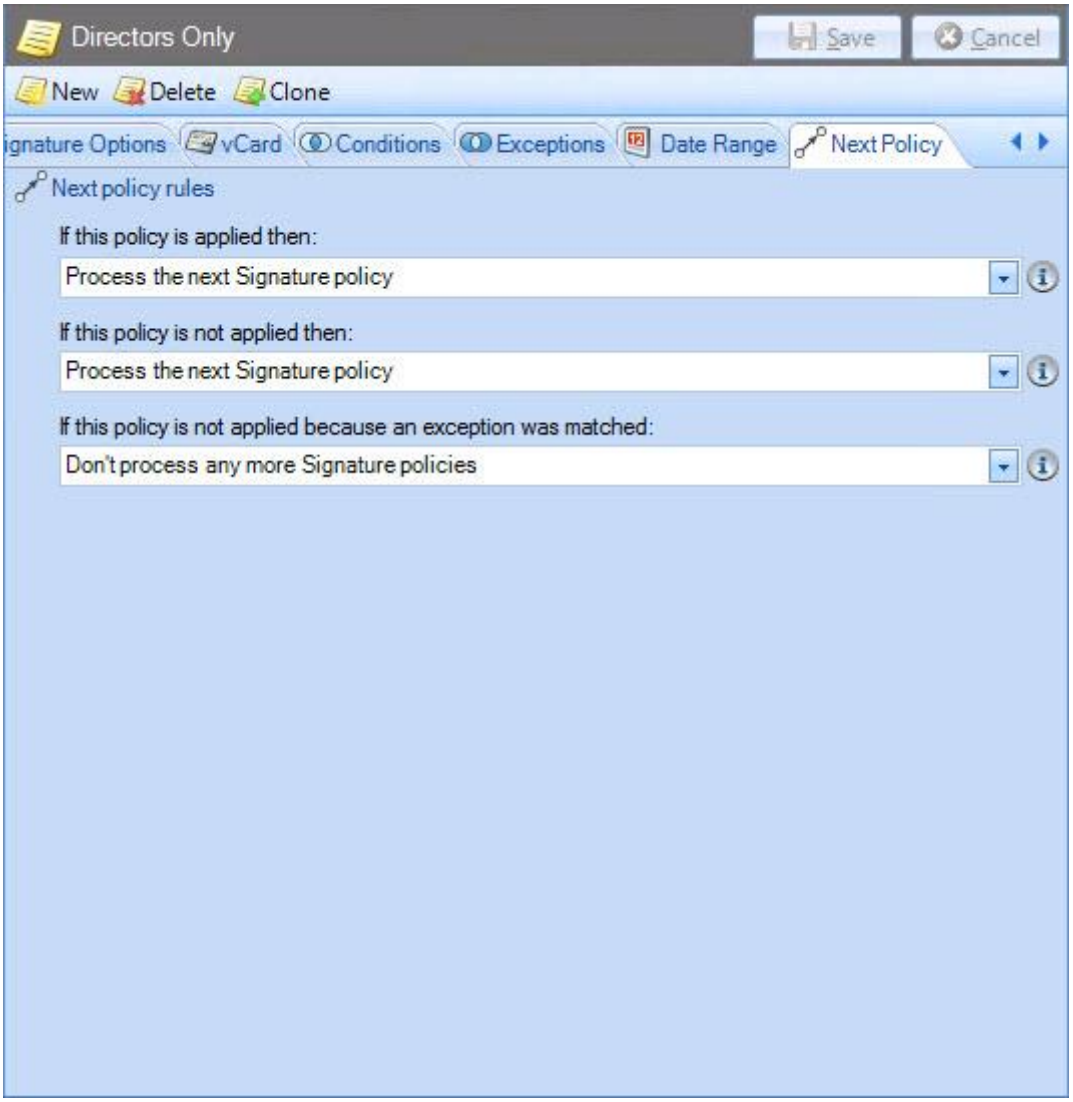
Having made required date and time selections, click OK to exit back to the updated date range tab:



To update an existing schedule, select its name and click edit. Similarly, click delete to remove the selected schedule.

Next Policy

If you have a number of policies which are dependent upon each other, you can create a 'policy chain' using the next policy tab:



Whilst you control the sequence in which policies are processed using the policy tab [pg.60], the next policy tab allows you to define specific policy chains based on whether the previous policy in the chain is or is not applied. These options are:

If this policy is applied then:

- Process the next signature policy
- Don't process any more signature policies

If this policy is not applied then:

- Process the next signature policy
- Don't process any more signature policies

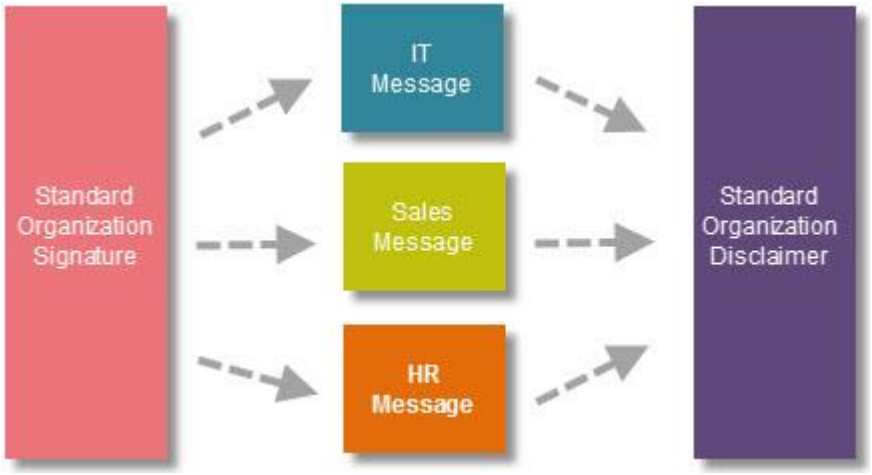
If this policy is not applied because an exception was matched:

- Process the next signature policy
- Don't process any more signature policies

You can use these options for a wide range of scenarios, creating policy chains as simple or as complex as required. For example, you might use the if this policy is applied then > don't process any more signature policies option to prevent more than one policy being applied. Conversely, you might define a policy to select a specific group of users and then use the if this policy is not applied then > process the next signature as a way of excluding groups of users without the need to add multiple exceptions.

Example Scenario

The illustration below shows a common scenario where a policy chain might be used:

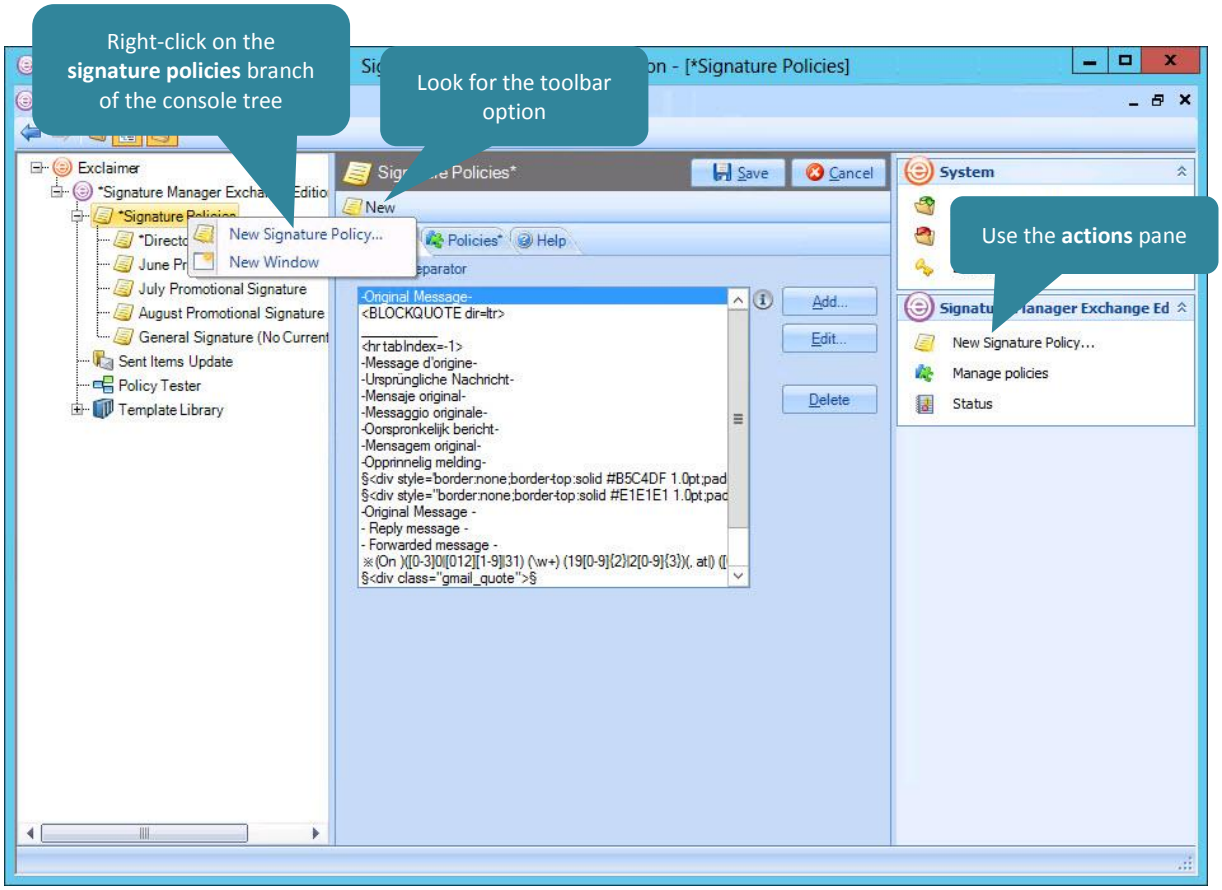


Here, an organization has three main departments - IT, Sales and HR. All members of the organization require a dynamic signature at the end of their email messages, together with a standard organizational disclaimer. However, members of the IT, Sales and HR departments also require a specific departmental message to be added before the standard organizational disclaimer.

To see how this policy chain would be defined, see how do I create a policy chain? [pg.127]

Adding a New Policy

Policies are added using the new signature policy wizard - a series of screens which guide you through the setup process one step at a time. The new signature policy wizard is available from various areas of Exclaimer Signature Manager Exchange Edition - it can be accessed from the console tree [pg.35], from the console toolbar [pg.34] and from the actions pane [pg.36]:



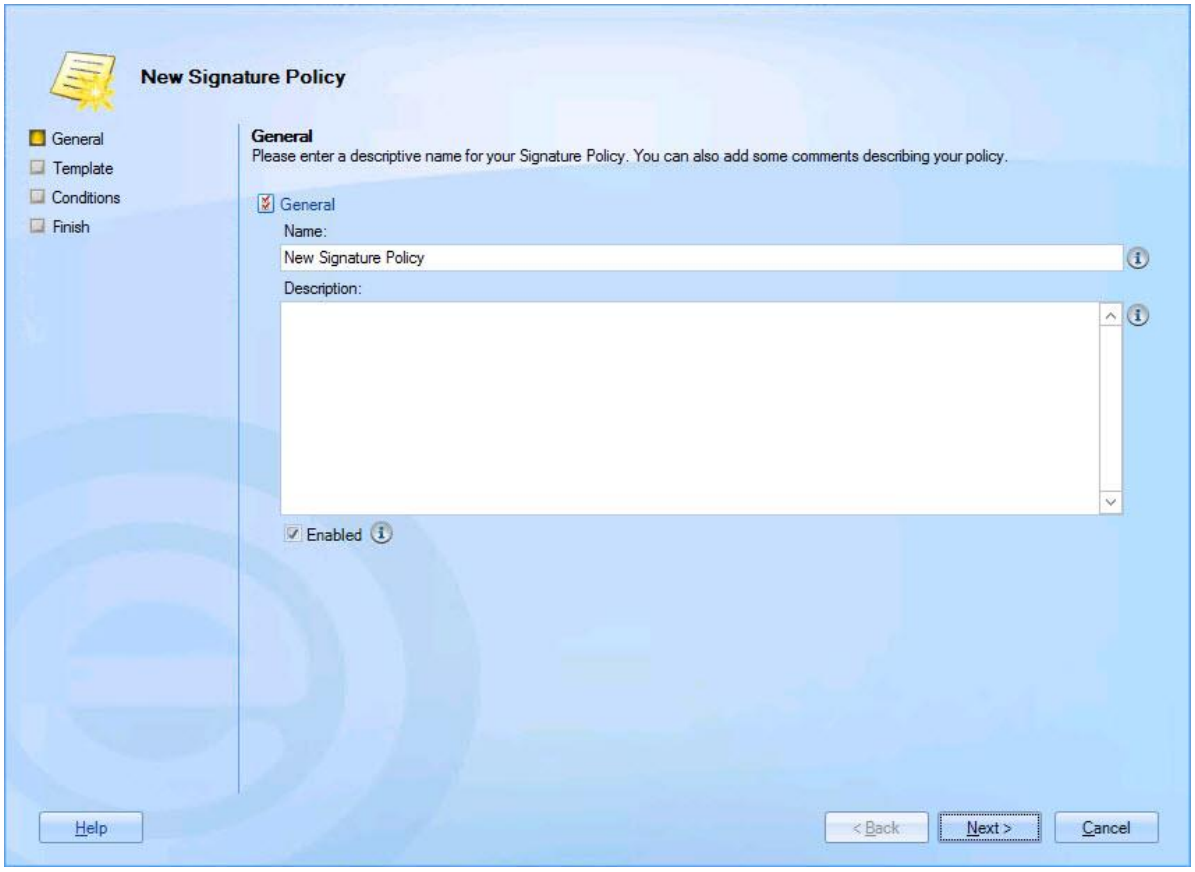
Having selected the new signature policy option, the new signature policy [pg.117] wizard is displayed.

The Add Policy Wizard

Policies are added using the new signature policy wizard - a series of screens which guide you through the setup process one step at a time. The new signature policy wizard is available from different areas of Exclaimer Signature Manager Exchange Edition - it can be accessed from the console tree [pg.35], from the console toolbar [pg.34] and from the actions pane [pg.36].

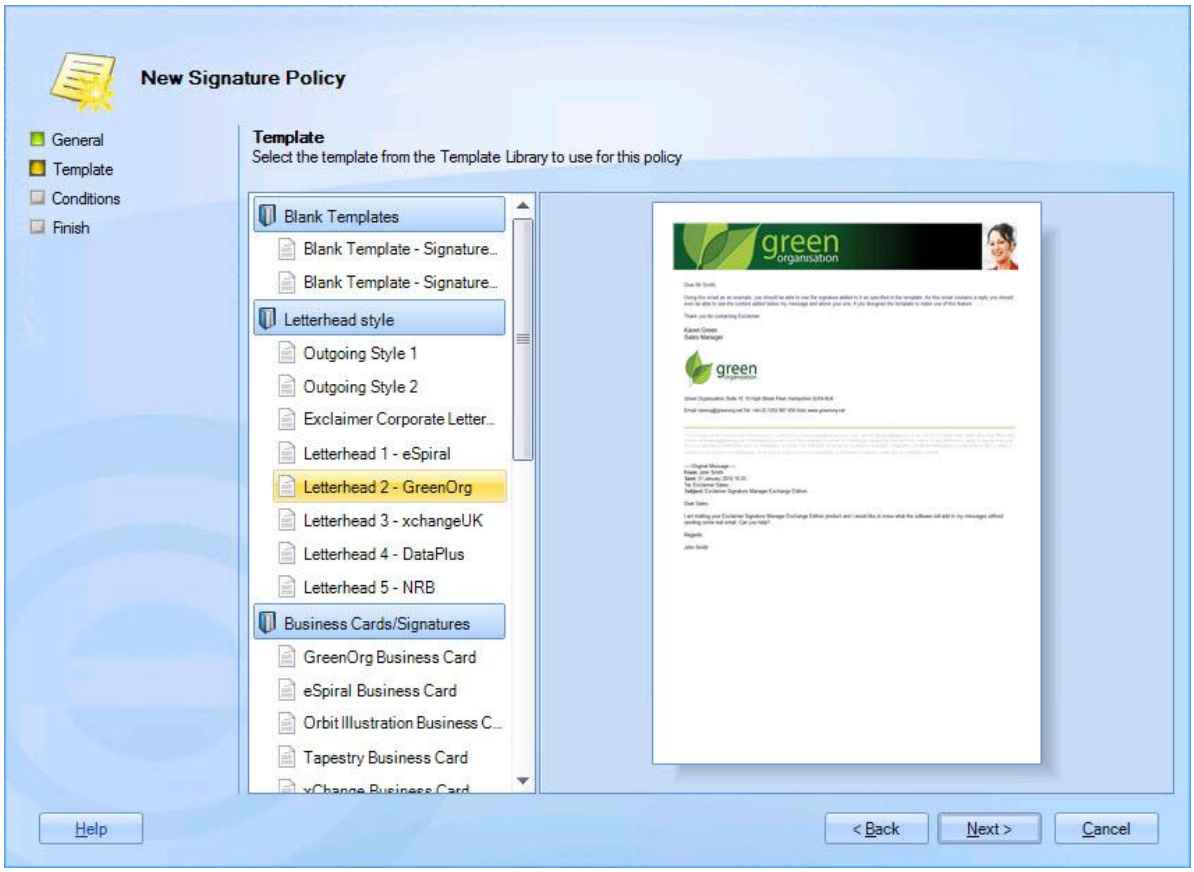
Step 1: Enter General Information

Enter a meaningful name and description for the policy and click next to continue. For further information about this tab see the anatomy of a policy - general [pg.78] page of this guide.



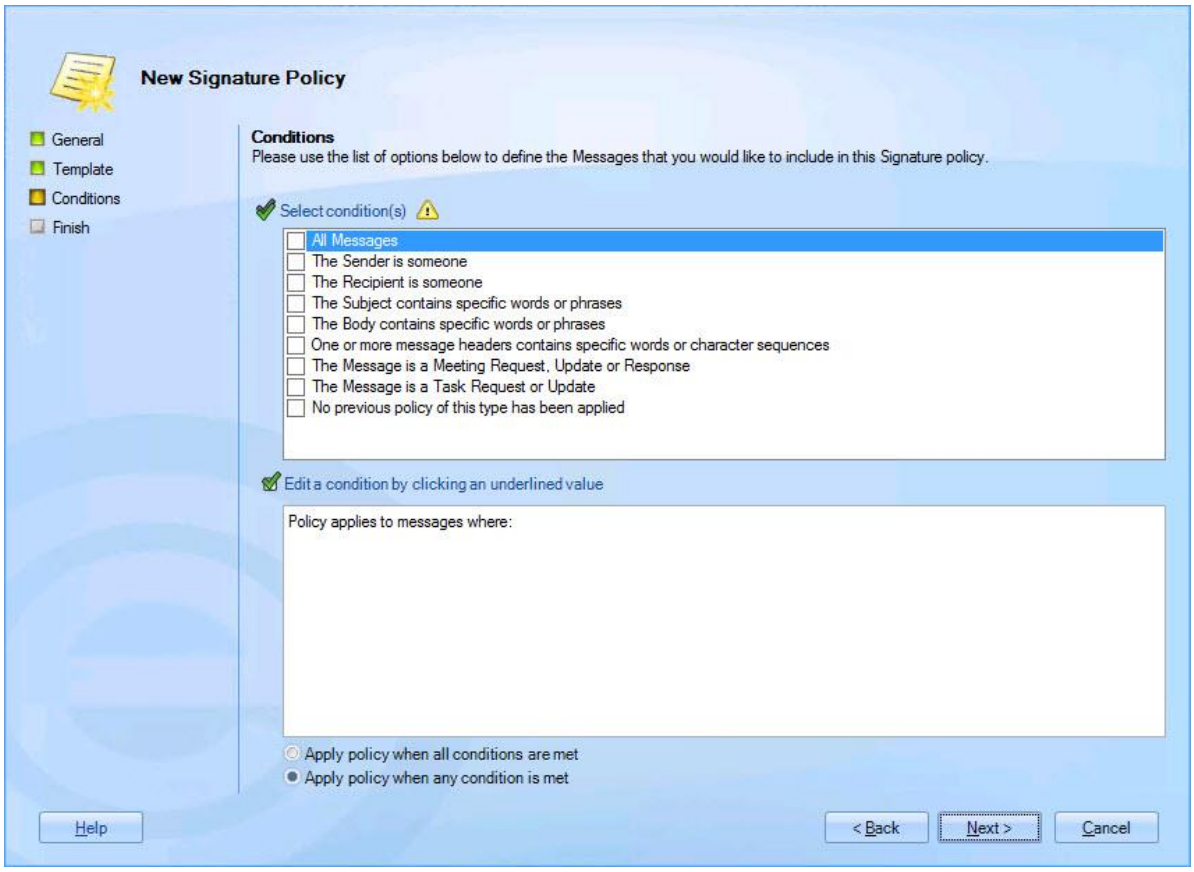
Step 2: Associate the Policy with a Template

A list of available templates [pg.176] is displayed down the left-hand side. Navigate this list and select the template to be associated with this policy, then click next to continue. For further information about this tab see the anatomy of a policy - template [pg.79] page of this guide:



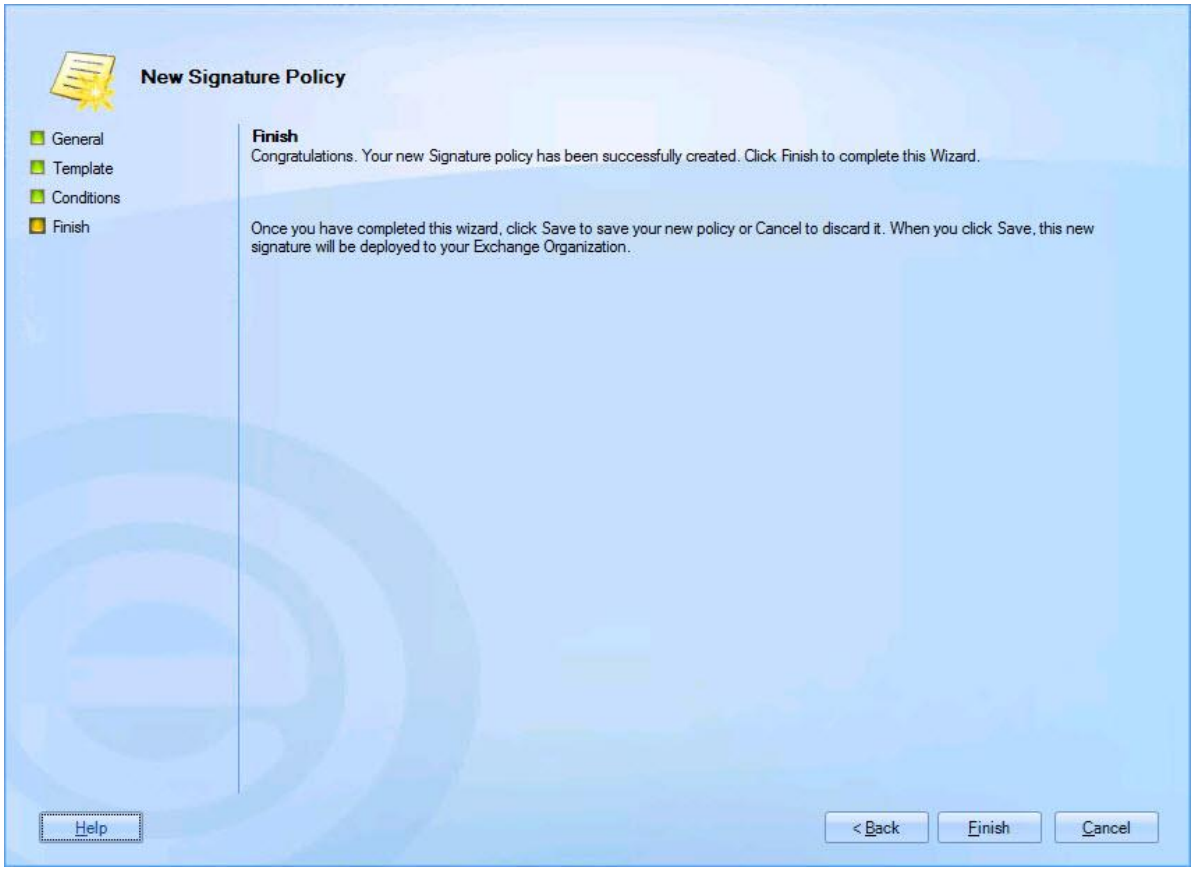
Step 3: Set Conditions for the Policy

Set criteria [pg.92] to determine the circumstances under which the signature is applied to messages, then click next to continue. Having created the policy, you can update the conditions at any time, and also add exceptions [pg.102]. For further information about this tab see the anatomy of a policy - conditions [pg.90] page of this guide:


New Signature Policy
General
Template
Conditions
Finish
Conditions
Please use the list of options below to define the Messages that you would like to include in this Signature policy.
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Edit a condition by clicking an underlined value
Policy applies to messages where:
Apply policy when all conditions are met
Apply policy when any condition is met
Help
< Back
Next >
Cancel

Step 4: Finish Up

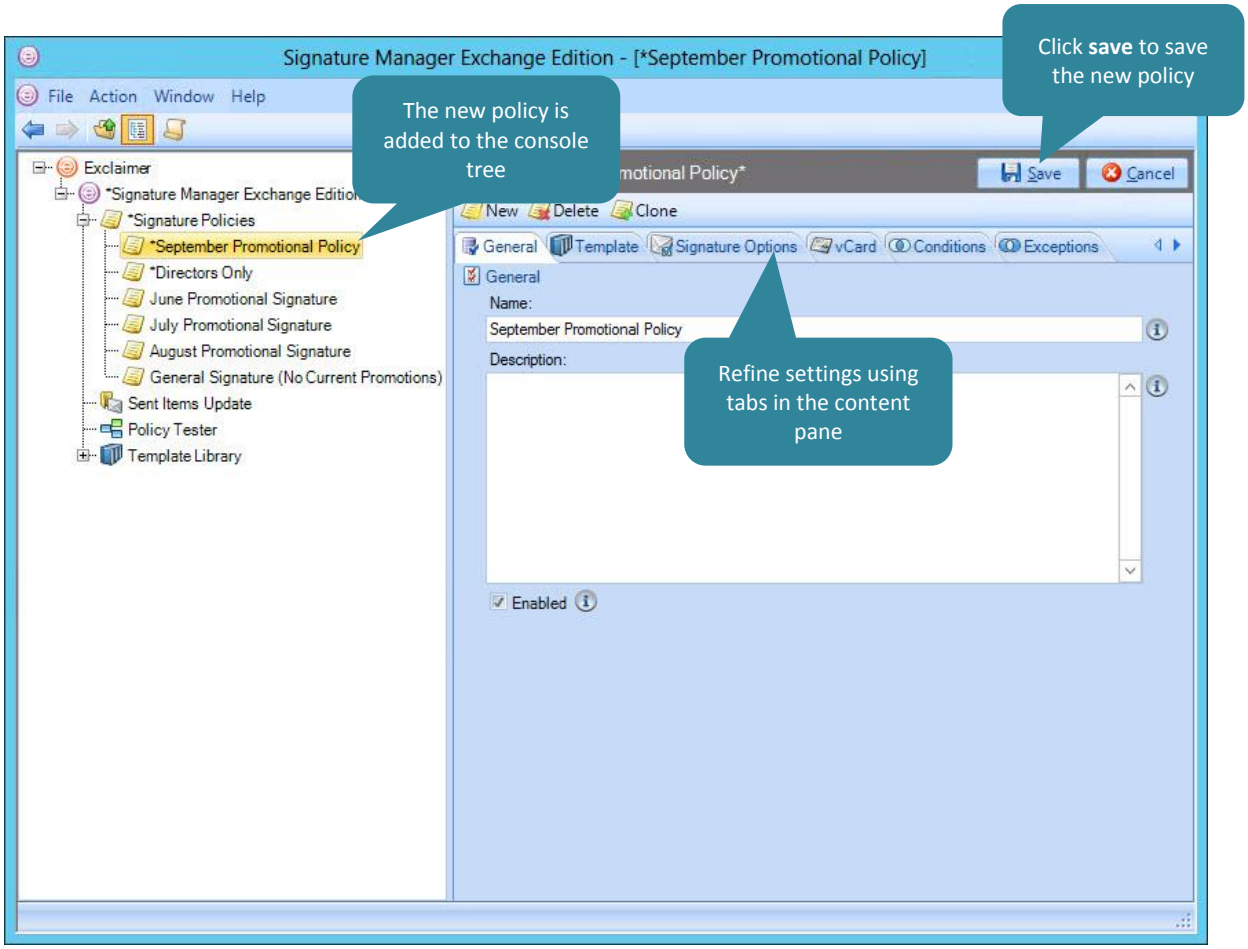
Click finish to exit the wizard and return to the Exclaimer console:


New Signature Policy
General
Template
Conditions
Finish
Finish
Congratulations. Your new Signature policy has been successfully created. Click Finish to complete this Wizard.
Once you have completed this wizard, click Save to save your new policy or Cancel to discard it. When you click Save, this new signature will be deployed to your Exchange Organization.
Help
< Back
Finish
Cancel

Step 5: Save Changes

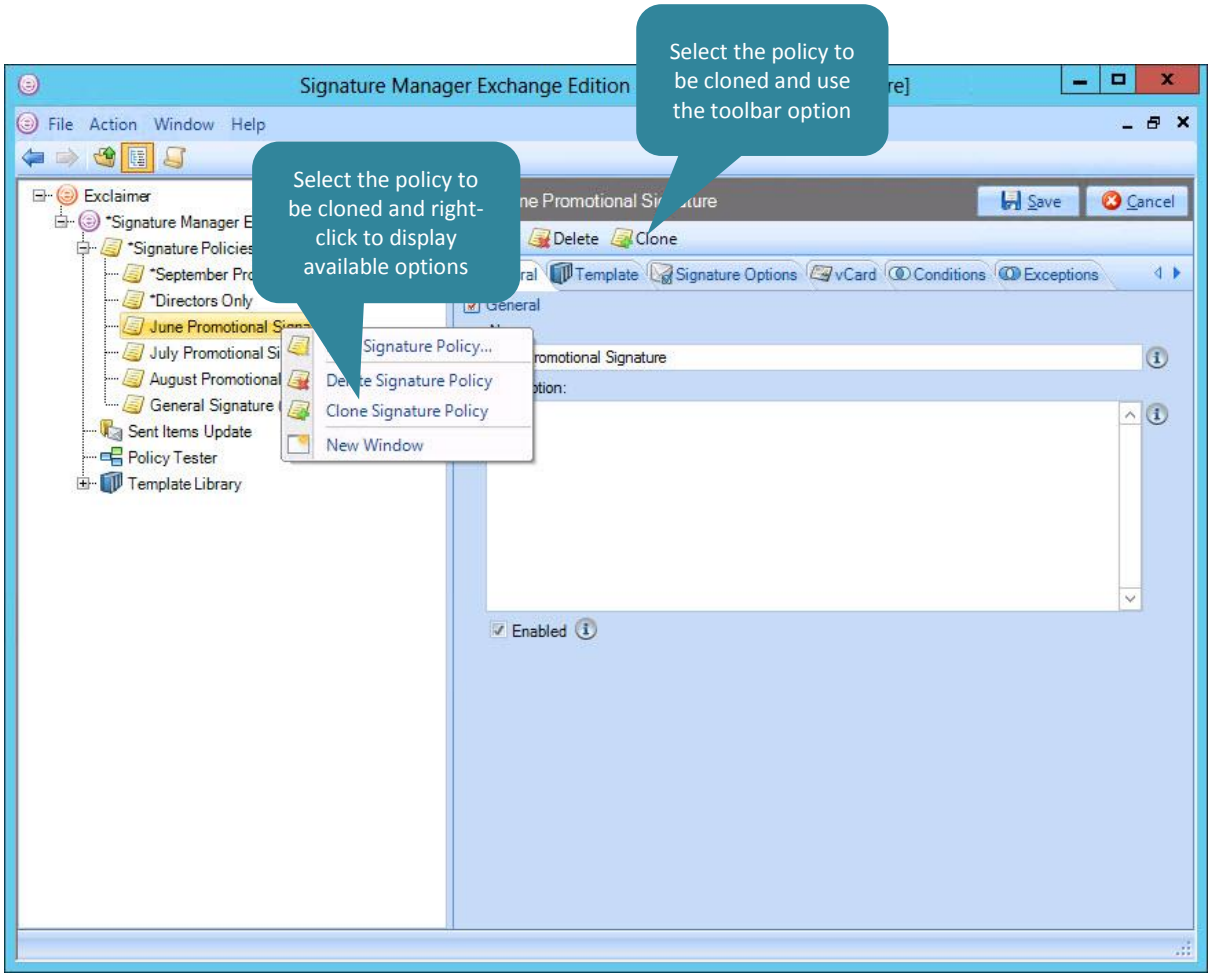
Having exited from the add new policy wizard, the new policy is added to the list of signatures in the console tree, but it is not yet saved (unsaved entries are displayed with an asterisk (*) to the left of the name).

Click save to save changes. From here you can use selection tabs [pg.36] to update settings for the policy, and choose to enable/disable the policy (if a policy is not enabled it will not be processed):



Cloning a Policy

If you need to create a new policy which has similar settings to an existing policy, it is quicker to take a copy of the existing policy and then update required settings for that copy (as opposed to creating a new policy from first principles [pg.116]). The clone option is used to create a copy of an existing policy for this purpose, and is available from the console toolbar [pg.34], or the right-click menu:



To clone an existing policy, select the policy to be copied from the console tree, then either click clone from the toolbar, or right click and select clone from the context menu. A copy of the selected policy is added to the console tree, ready to be updated - from here you can change the name, description and any other required settings.

When a policy is cloned, a duplicate copy of the template associated with that policy is also made and added to the template library [pg.176]. You can edit and save this template, or associate a different template [pg.146] with the new policy, as required.

Having updated the cloned policy, click save to save changes.

Changing a Policy

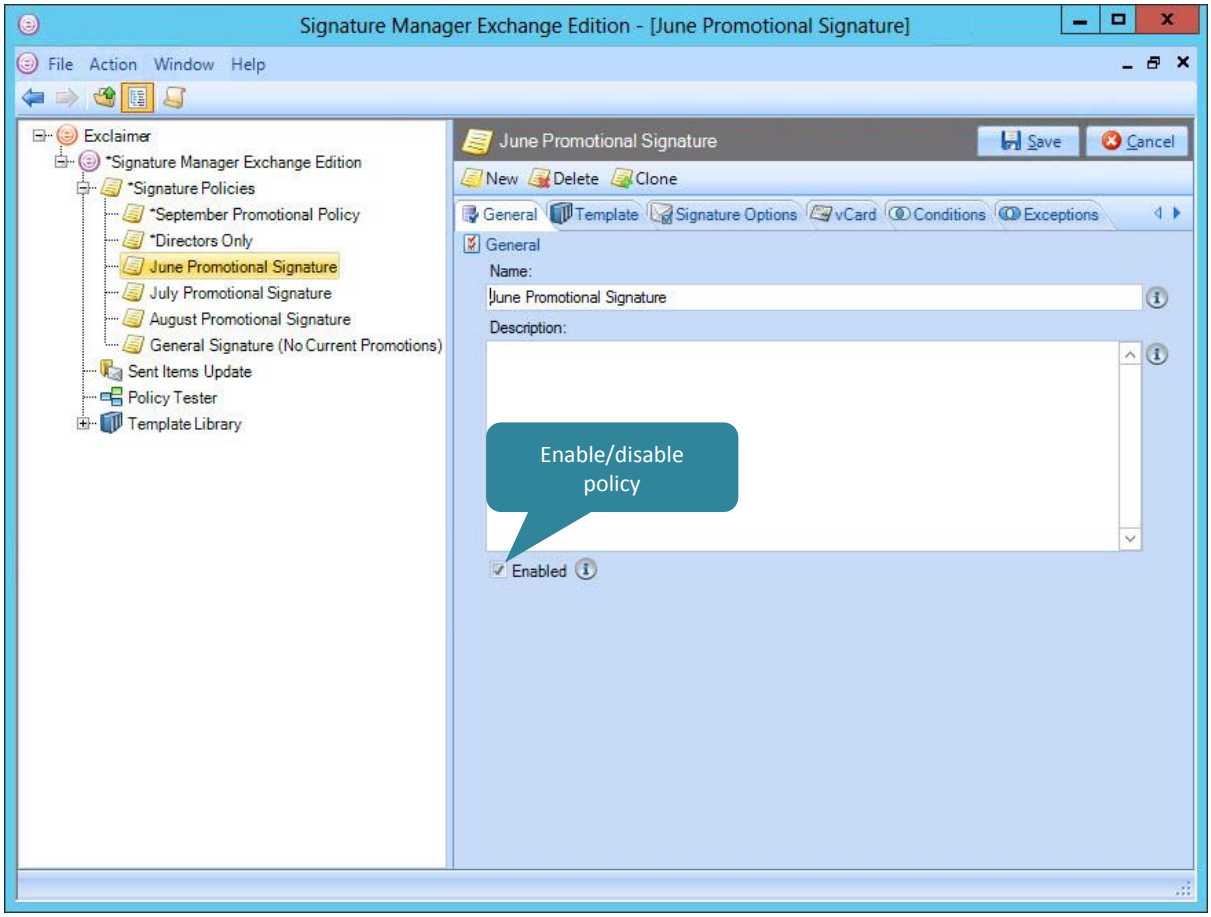
To update an existing policy, simply select the policy (either from the console tree [pg.35]or the policy list [pg.60]) and update settings on selection tabs [pg.36] as required.

When a policy has been changed but not saved, the branch is displayed with an asterisk (*) symbol. You can see which tabs contain these unsaved changes, by looking for an asterisk to the right of the tab name.

When you are satisfied that all required changes have been made correctly, click save to save the new settings. All asterisk symbols are cleared once changes have been saved.

Enabling and Disabling a Policy

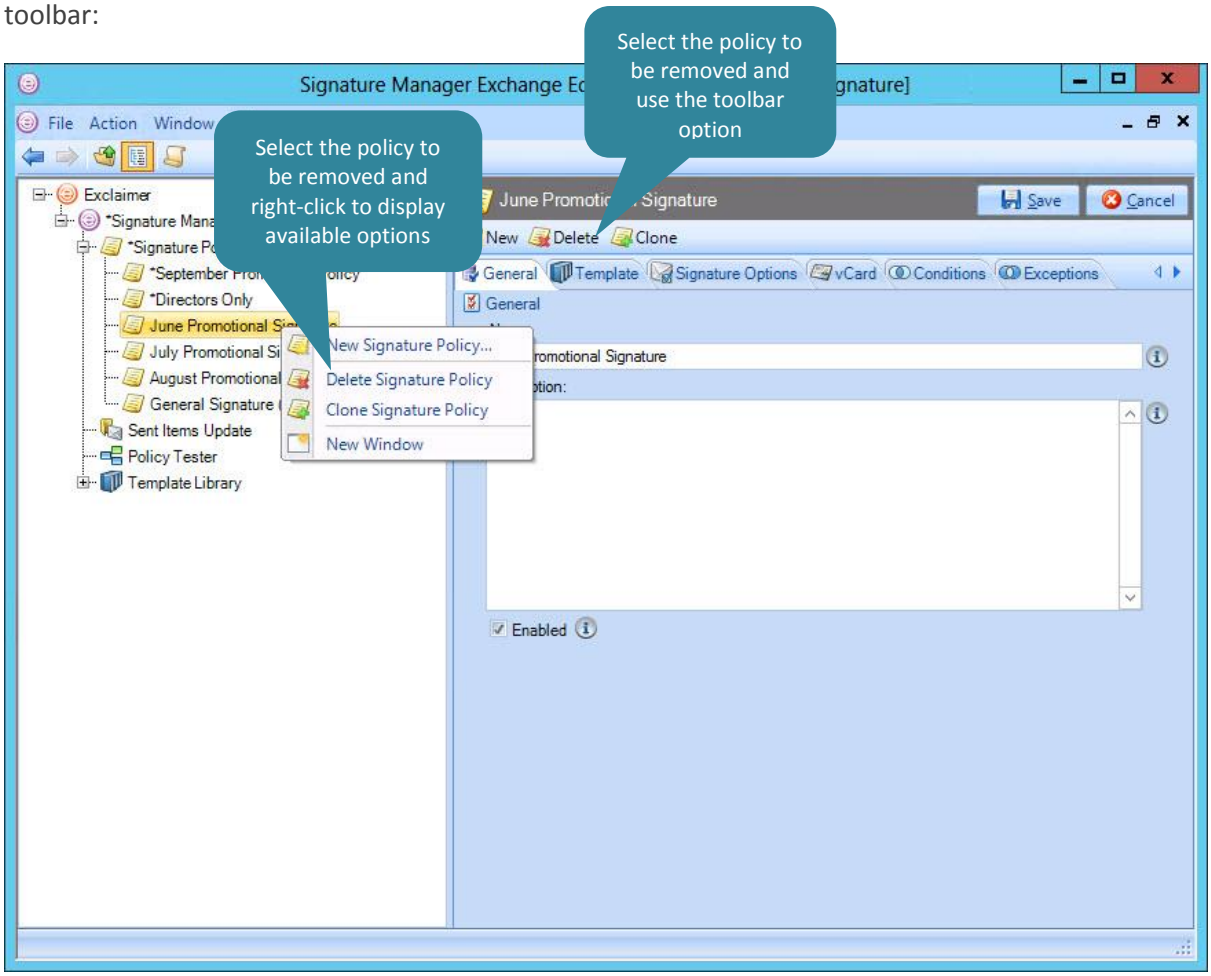
To quickly enable or disable a policy, select the required policy (either from the console tree [pg.35] or from the policy list [pg.60]):



Ensure that the enabled check box is selected to enable the policy, or de-selected to disable the policy. Click save to save changes.

Removing a Policy

To remove an existing policy, select the policy (either from the console tree [pg.35] or the policy list [pg.60]). Then, either right-click and select delete from the context menu, or click delete from the toolbar:



Having chosen to delete a policy, you are asked are you sure you want to delete this policy?. Click yes to confirm the deletion or no to abandon the task. Finally, click save to save changes.

NOTE

A policy is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the policy will be reinstated in the console tree.

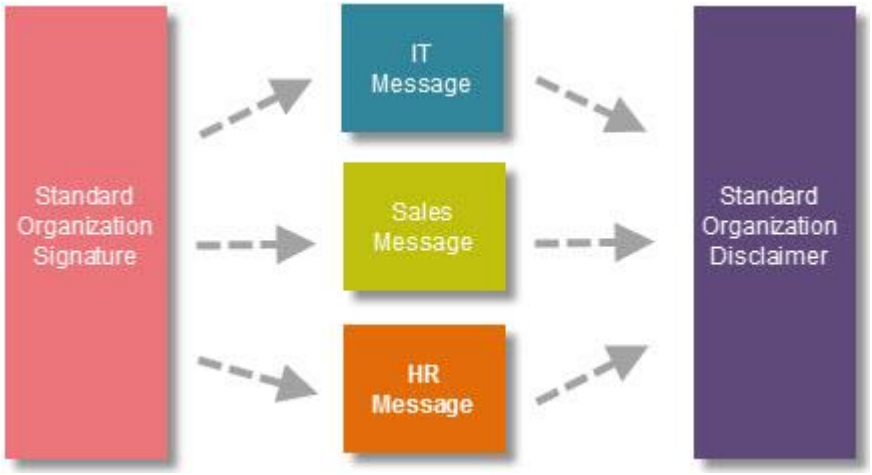
How To...

This section contains instructions for completing a selection of common tasks with policies, within Exclaimer Signature Manager Exchange Edition:

- How do I create a policy chain? [pg.127]
- How do I create a policy for all internal or all external emails? [pg.131]
- How do I stop a signature being repeated in an email conversation? [pg.134]
- How do I define a policy based upon a subject line trigger word? [pg.135]
- How do I create a policy based upon specific Active Directory attributes? [pg.138]
- How do I change the sequence in which policies run? [pg.145]
- How do I change the template associated with a policy? [pg.146]

How Do I Create a Policy Chain?

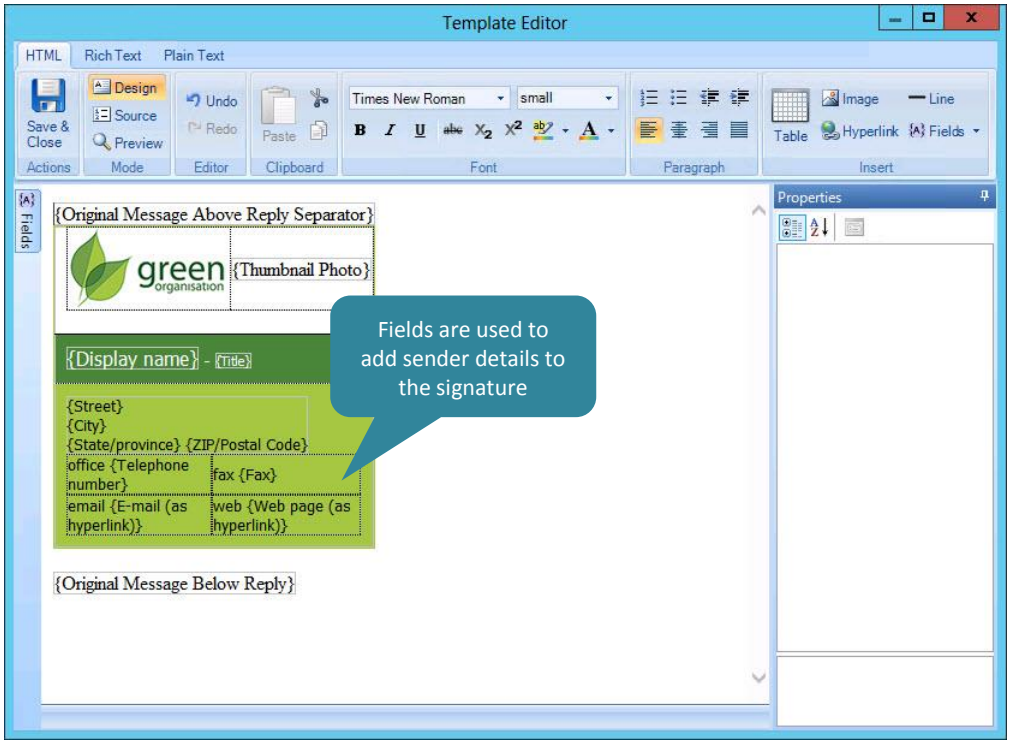
The illustration below shows a common scenario where a policy chain might be used:



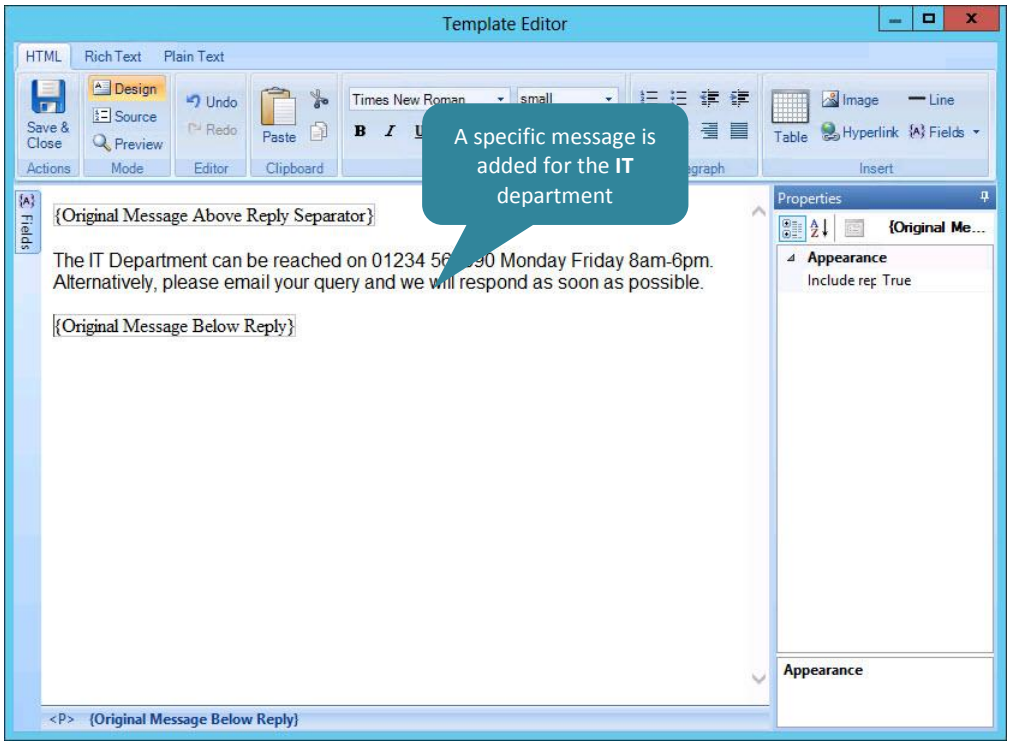
Here, an organization has three main departments - IT, Sales and HR. All members of the organization require a dynamic signature at the end of their email messages, together with a standard organizational disclaimer. However, members of the IT, Sales and HR departments also require a specific departmental message, to be added before the standard organizational disclaimer.

The steps required to complete this setup are detailed below:

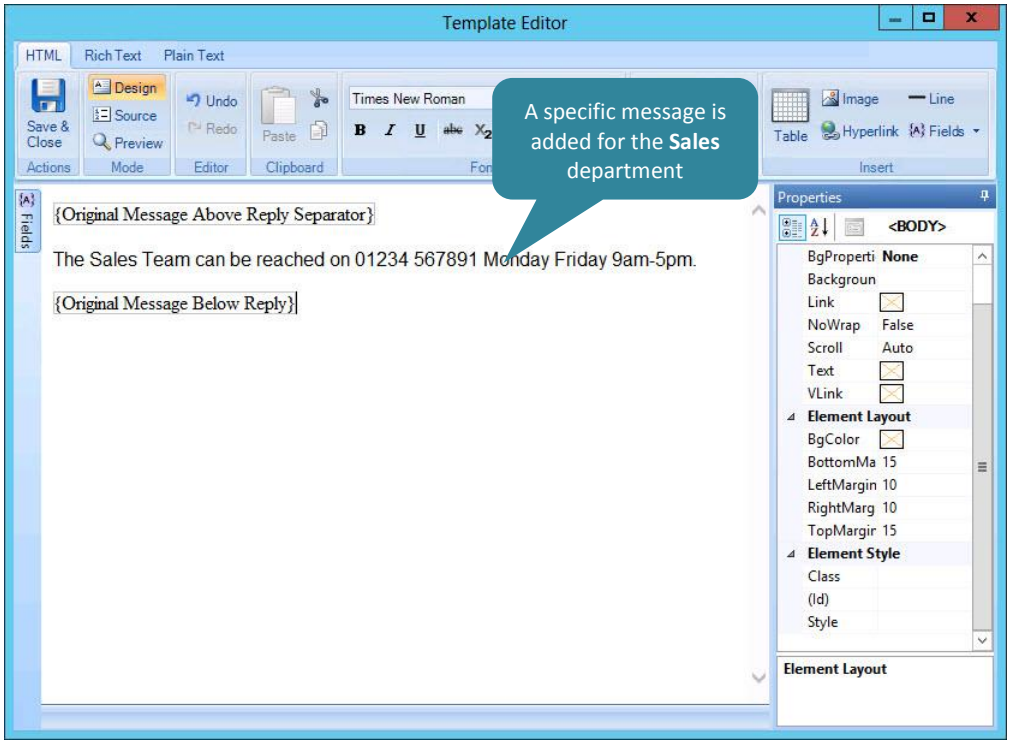
1. Create a main template with dynamic signature content, to be applied to **all messages** sent - i.e. a standard organization signature template. For example:



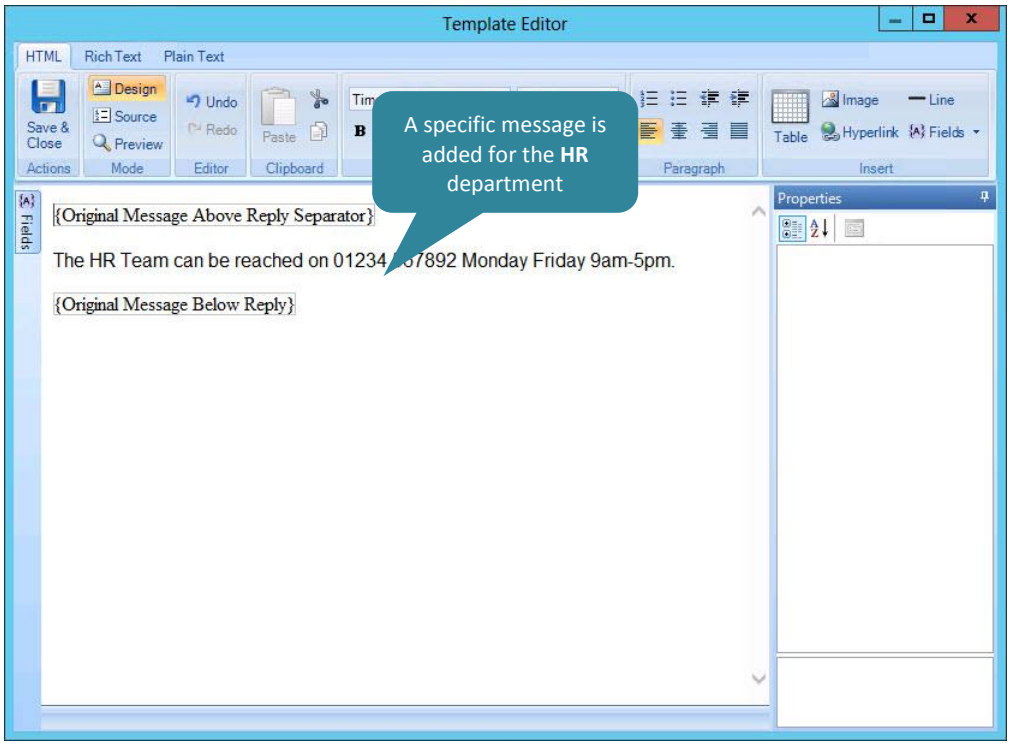
2. Create a template for **IT** which contains a specific message to be added after dynamic signature content, for messages sent from the **IT department**. For example:



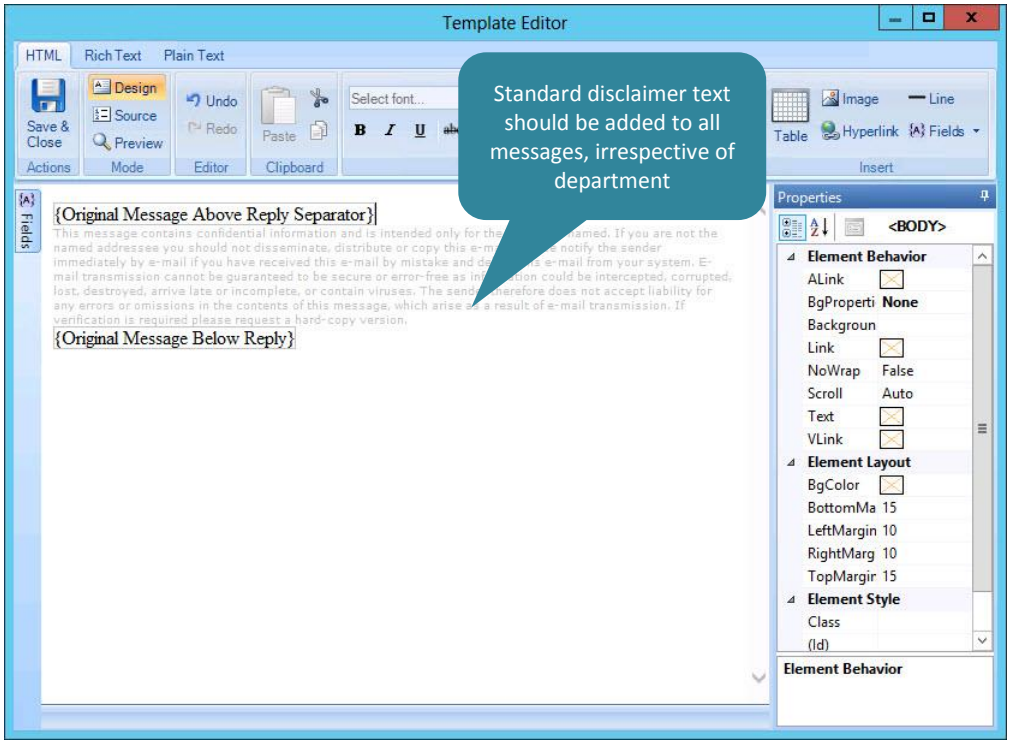
3. Create a template for **Sales** which contains a specific message to be added after dynamic signature content, for messages sent from the **Sales department**. For example:



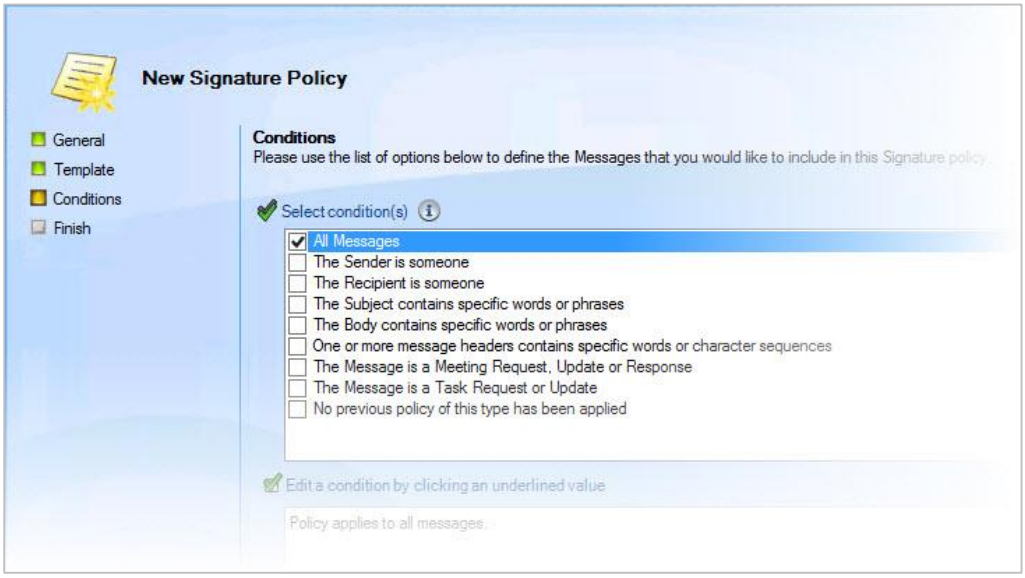
4. Create a template for **HR** which contains a specific message to be added after dynamic signature content, for messages sent from the **HR department**. For example:



5. Create a template with standard organization disclaimer content, to be applied to **all messages** sent. For example:



6. Create a signature policy, associate it with the main signature template (created in **step 1**) and set conditions so that the policy applies to **all messages**:


New Signature Policy
General
Template
Conditions
Finish
Conditions
Please use the list of options below to define the Messages that you would like to include in this Signature policy.
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Edit a condition by clicking an underlined value
Policy applies to all messages.

7. Set next policy options to process the next policy in sequence (which will be the **IT department policy**).

8. Create a signature policy for the **IT department**, associate it with the **IT department template** (created in **step 2**) and set conditions so that the policy only applies to messages from users within the **IT department**.

9. Set next policy options to process the next policy in sequence (which will be the **Sales department policy**).

10. Create a signature policy for the **Sales department**, associate it with the **Sales department template** (created in **step 3**) and set conditions so that the policy only applies to messages from users within the **Sales department**.

11. Set next policy options to process the next policy in sequence (which will be the **HR department policy**).

12. Create a signature policy for the **HR department**, associate it with the **HR department template** (created in **step 4**) and set conditions so that the policy only applies to messages from users within the **HR department**.

13. Set next policy options to process the next policy in sequence (which will be the **standard organization disclaimer policy**).

14. Create a signature policy for the **standard organization disclaimer**, associate it with the **standard organization disclaimer** template (created in **step 5**) and set conditions so that the policy applies to **all messages**.

15. Set next policy options so that no further policies are processed.

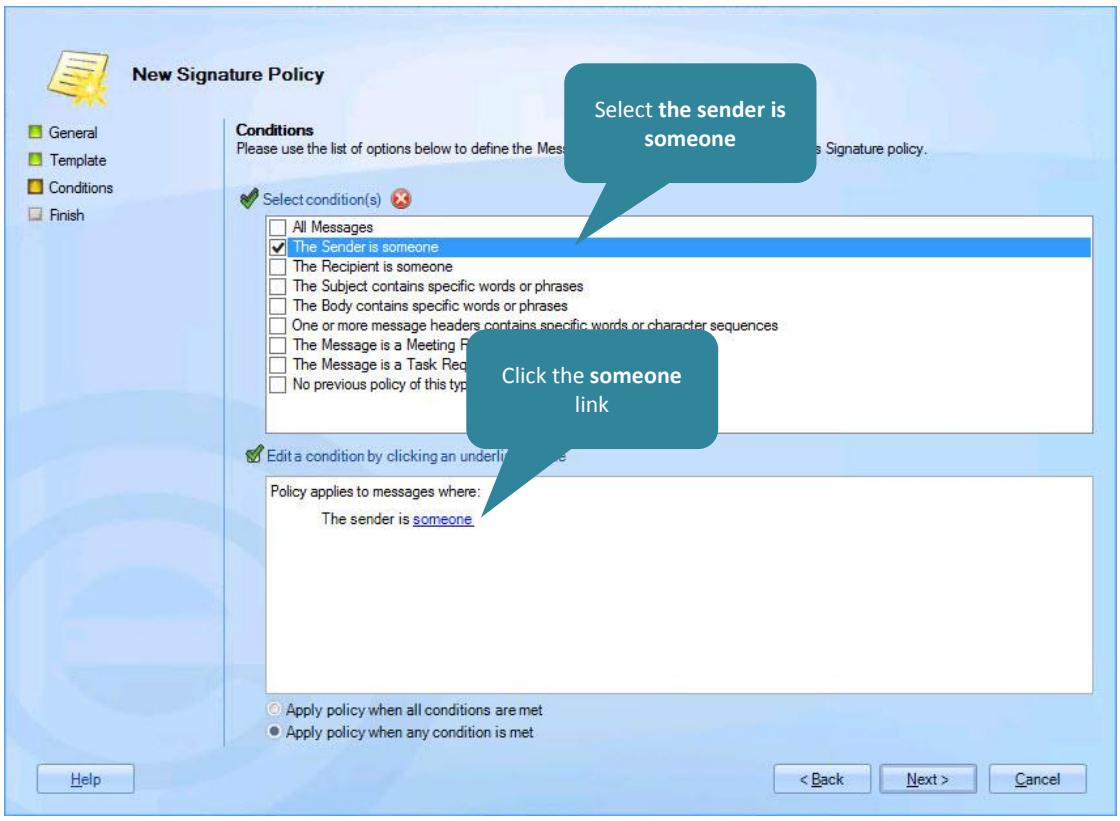
16. In the policies tab, ensure that policies are sequenced [pg.145] as **Standard Organization Signature Policy** > **IT Department Policy** > **Sales Department Policy** > **HR Department Policy** > **Standard Organization Disclaimer Policy**.

How do I Create a Policy for All Internal or All External Emails?

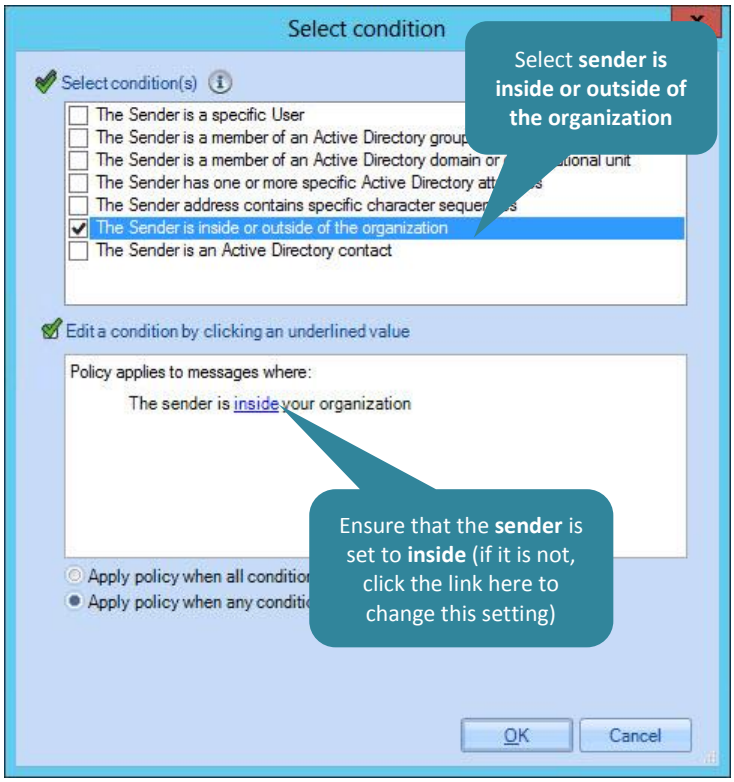
In some cases, you may wish to treat internal and external email messages differently when applying signatures. One way to do this is to define a policy for only internal emails and another policy for only external emails. Alternatively, you might incorporate this as an exception [pg.102] - for example - apply a signature for email messages except where the recipient is outside of the organization (and define a separate policy to manage the exceptions).

The following example shows how to use a condition [pg.90] to handle internal/external emails:

1. Access policy conditions and select the sender is someone option:

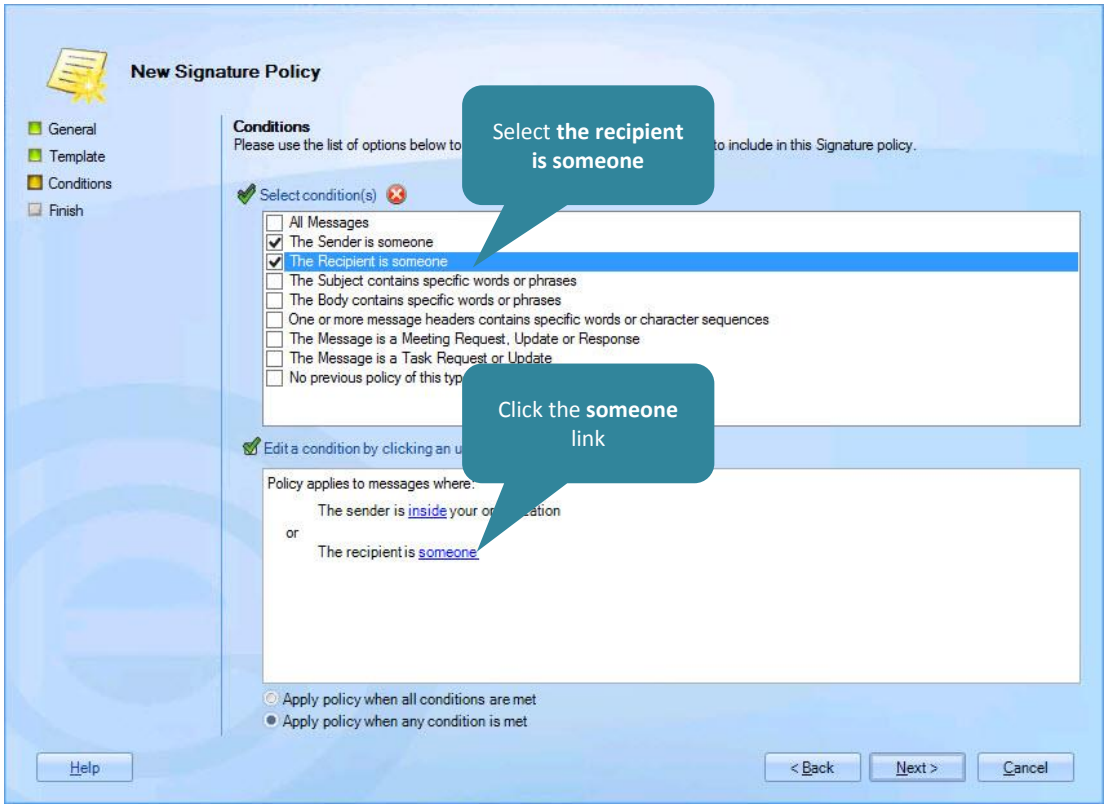

New Signature Policy
General
Template
Conditions
Finish
Conditions
Please use the list of options below to define the Mes
s Signature policy.
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting R
The Message is a Task Req
No previous policy of this typ
Edit a condition by clicking an underli
Policy applies to messages where:
The sender is someone
Apply policy when all conditions are met
Apply policy when any condition is met
Help
< Back
Next >
Cancel
Select the sender is someone
Click the someone link

2. Click the someone link in the lower pane for further options:

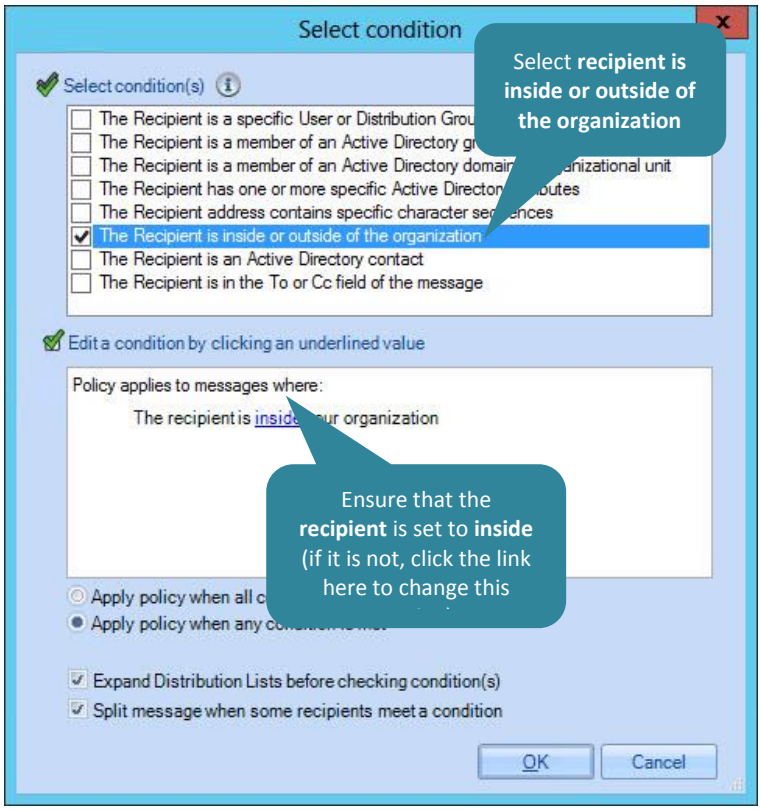

Select condition
Select condition(s)
The Sender is a specific User
The Sender is a member of an Active Directory group
The Sender is a member of an Active Directory domain or
The Sender has one or more specific Active Directory att
The Sender address contains specific character sequen
The Sender is inside or outside of the organization
The Sender is an Active Directory contact
Edit a condition by clicking an underlined value
Policy applies to messages where:
The sender is inside your organization
Apply policy when all conditio
Apply policy when any conditi
OK
Cancel
Select sender is inside or outside of the organization
Ensure that the sender is set to inside (if it is not, click the link here to change this setting)

3. Ensure that the setting is inside the organization (this is the default setting but, if required, click the hyperlink to access inside / outside options), then click OK to exit back to the conditions tab.

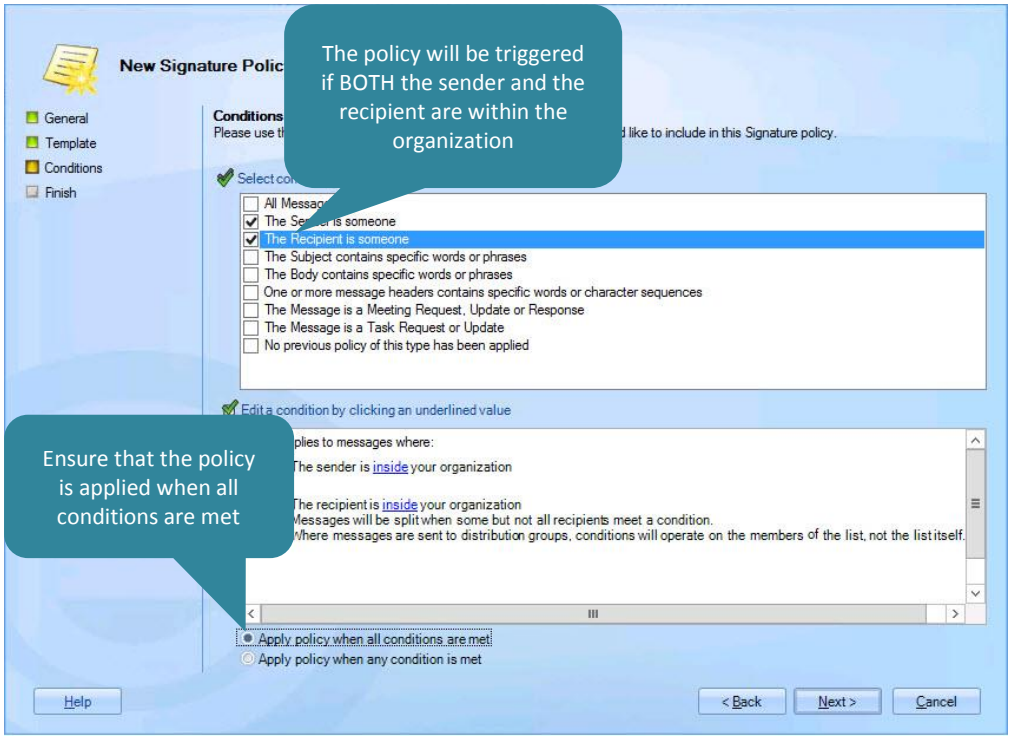
4. Select the recipient is someone option:


New Signature Policy
General
Template
Conditions
Finish
Conditions
Please use the list of options below to
to include in this Signature policy.
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this typ
Edit a condition by clicking an u
Policy applies to messages where:
The sender is inside your or ation
or
The recipient is someone
Apply policy when all conditions are met
Apply policy when any condition is met
Help
< Back
Next >
Cancel
Select the recipient is someone
Click the someone link

5. Click the someone link in the lower pane for further options:

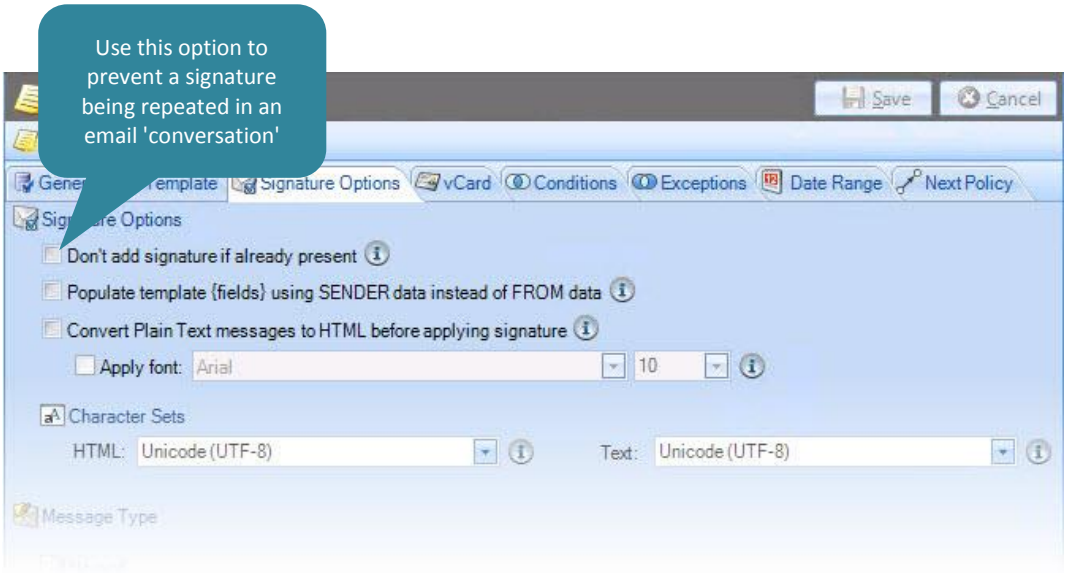

Select condition
Select recipient is inside or outside of the organization
Select condition(s)
The Recipient is a specific User or Distribution Grou
The Recipient is a member of an Active Directory gr
The Recipient is a member of an Active Directory domain
The Recipient has one or more specific Active Director
The Recipient address contains specific character se
The Recipient is inside or outside of the organization
The Recipient is an Active Directory contact
The Recipient is in the To or Cc field of the message
Edit a condition by clicking an underlined value
Policy applies to messages where:
The recipient is inside
Ensure that the recipient is set to inside (if it is not, click the link here to change this
Apply policy when all c
Apply policy when any
Expand Distribution Lists before checking condition(s)
Split message when some recipients meet a condition
OK
Cancel

6. Ensure that the setting is inside the organization (this is the default setting but, if required, click the hyperlink to access inside / outside options), then click OK to exit back to the conditions tab where both conditions are defined:


New Signature Polic
The policy will be triggered if BOTH the sender and the recipient are within the organization
General
Template
Conditions
Finish
Conditions
like to include in this Signature policy.
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Edit a condition by clicking an underlined value
The sender is inside your organization
The recipient is inside your organization
Messages will be split when some but not all recipients meet a condition.
Where messages are sent to distribution groups, conditions will operate on the members of the list, not the list itself.
Ensure that the policy is applied when all conditions are met
Apply policy when all conditions are met
Apply policy when any condition is met
Help
< Back
Next >
Cancel

How Do I Stop a Signature Being Repeated In an Email Conversation?

There may be times where it is only appropriate to insert a given signature once. For example, if you are applying a signature to outgoing messages, you might want it to be added the first time that a message is sent, but prefer not to add it at the end of any subsequent replies if the email turns into a conversation. This is simple to achieve by selecting the don't add signature if already present check box on the signature options tab [pg.82]:



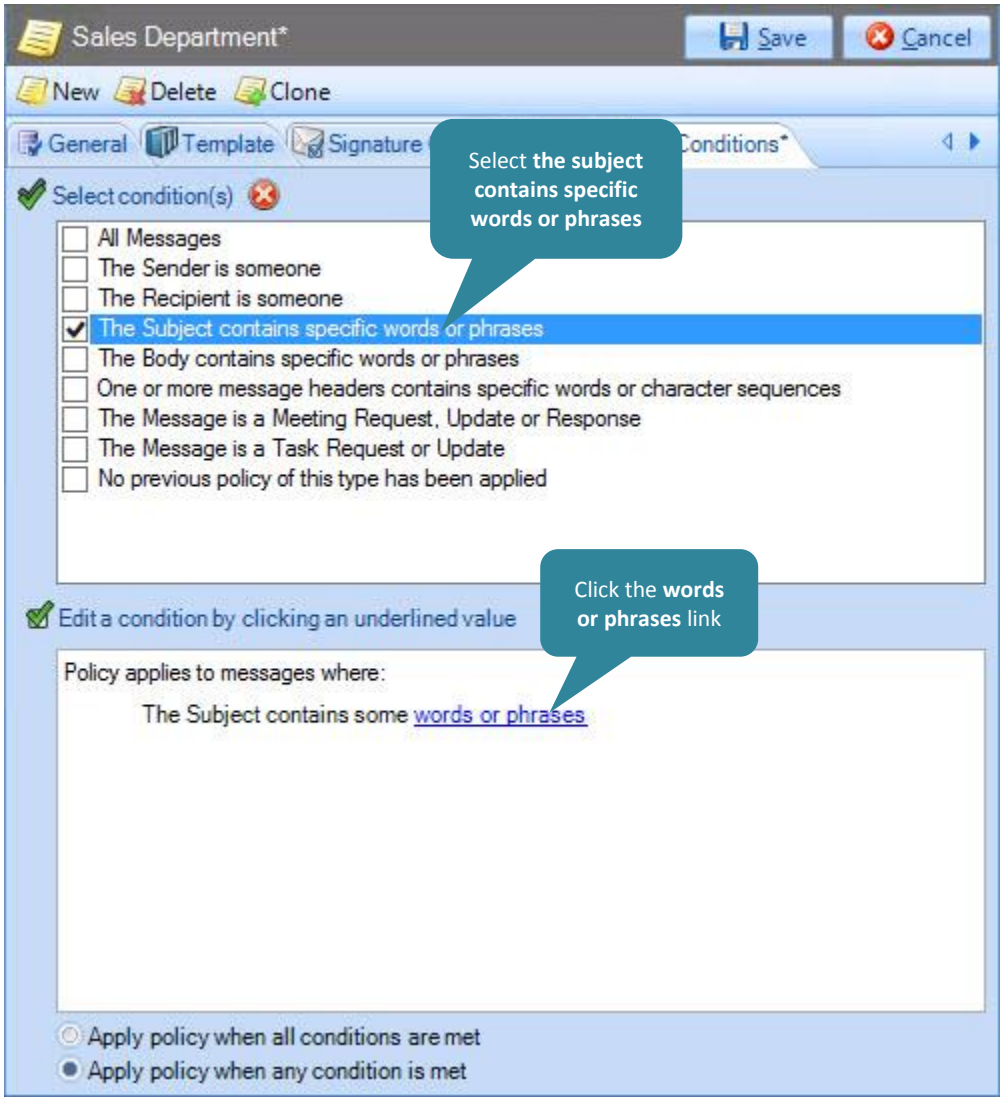
How Do I Define a Policy Based Upon a Subject Line Trigger Word?

It is sometimes useful to apply signatures, based on a 'trigger word' in the subject line of outgoing emails. For example, you might run a sales promotion and need to apply a banner image if the sender enters SALE-DEC13 in the subject line of any outgoing messages. You might also wish to remove the trigger word from the subject line, so that the recipient never sees it (this is particularly useful if you are using codes as trigger words, since these might be confusing for recipients to see).

To achieve this, define a policy where the conditions [pg.90] are set for subject contains specific words or phrases, as shown below:

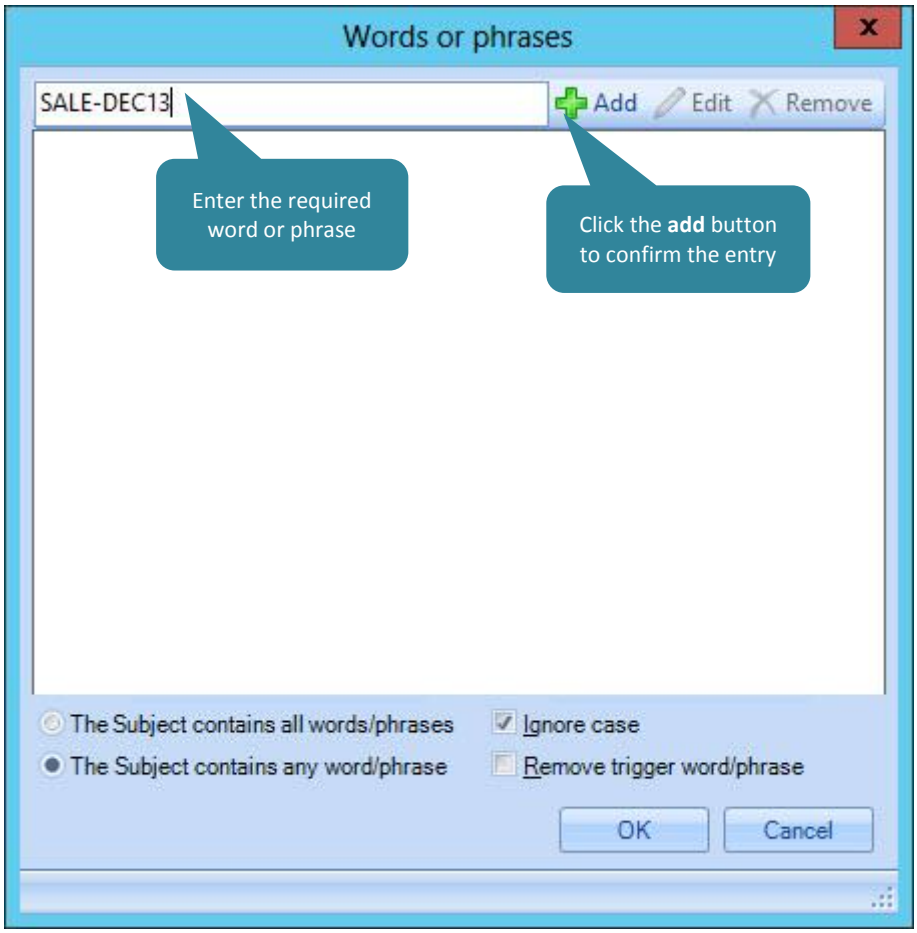
Step 1: Select 'The Subject Contains Specific Words or Phrases' Option

Having selected this option, click the words or phrases link in the lower pane:


Sales Department*
Save
Cancel
New
Delete
Clone
General
Template
Signature
Conditions*
Select condition(s)
Select the subject contains specific words or phrases
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
Edit a condition by clicking an underlined value
Click the words or phrases link
Policy applies to messages where:
The Subject contains some words or phrases
Apply policy when all conditions are met
Apply policy when any condition is met

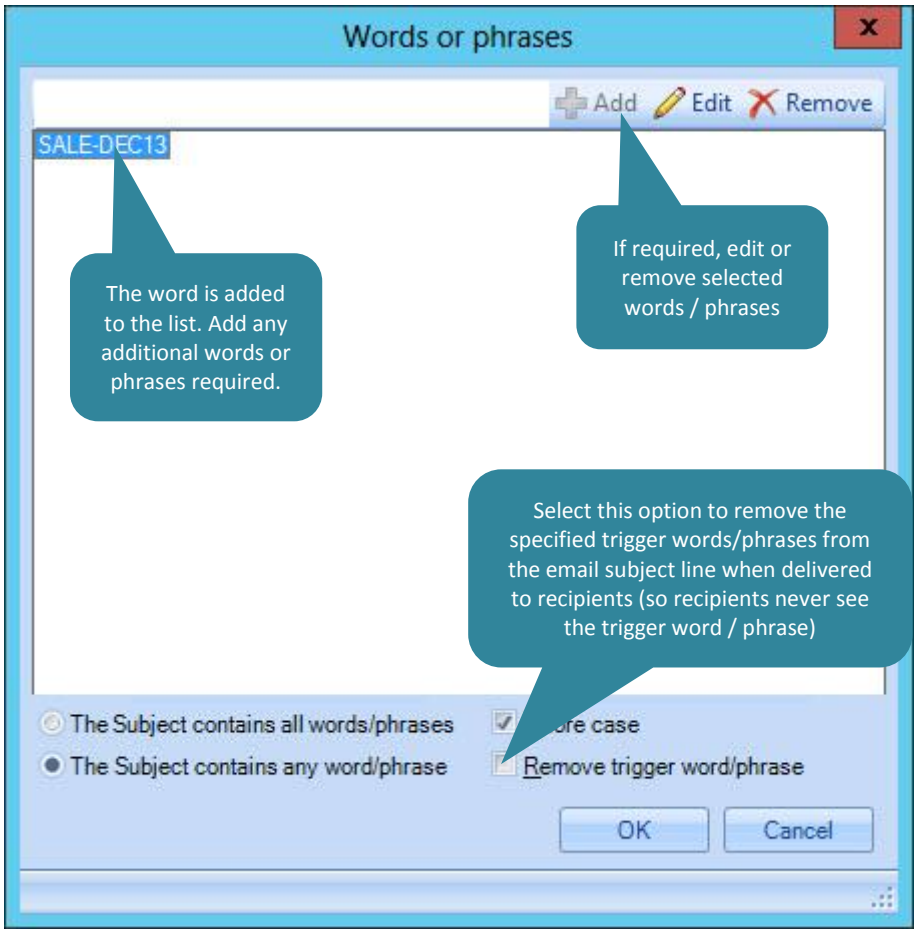
Step 2: Add Required Words and Phrases

Enter as many words and phrases as required, using the add button to confirm each one. If you specify multiple words in a single line, they are treated as a phrase:



Step 3: Set options for words and phrases

Choose whether all or any words / phrases must be present to trigger the signature. Also choose whether or not to ignore case, and whether or not to remove trigger words / phrases:

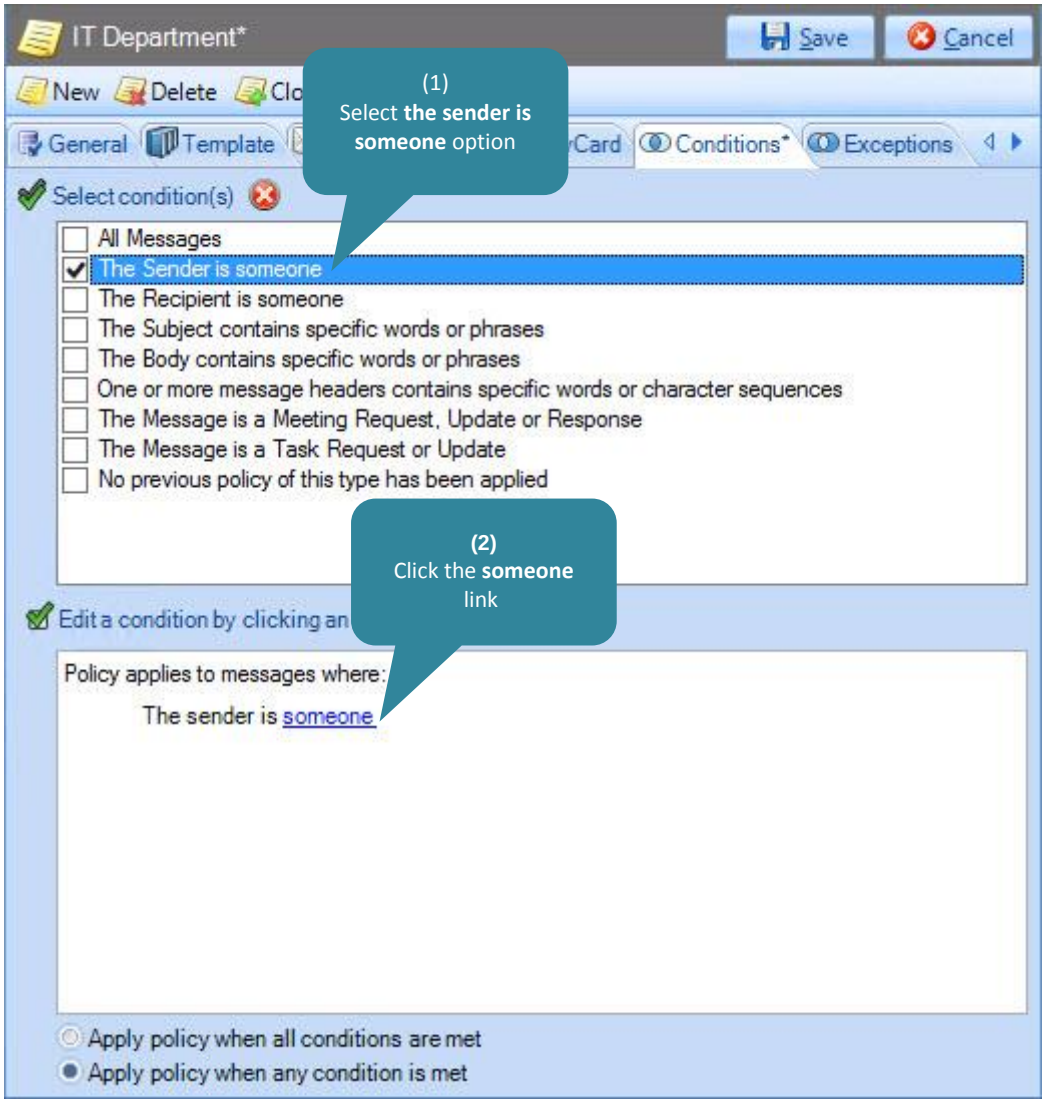

Words or phrases
Add
Edit
Remove
SALE-DEC13
The word is added to the list. Add any additional words or phrases required.
If required, edit or remove selected words / phrases
Select this option to remove the specified trigger words/phrases from the email subject line when delivered to recipients (so recipients never see the trigger word / phrase)
The Subject contains all words/phrases
The Subject contains any word/phrase
Remove trigger word/phrase
OK
Cancel

How Do I Create A Policy Based Upon Specific Active Directory Attributes?

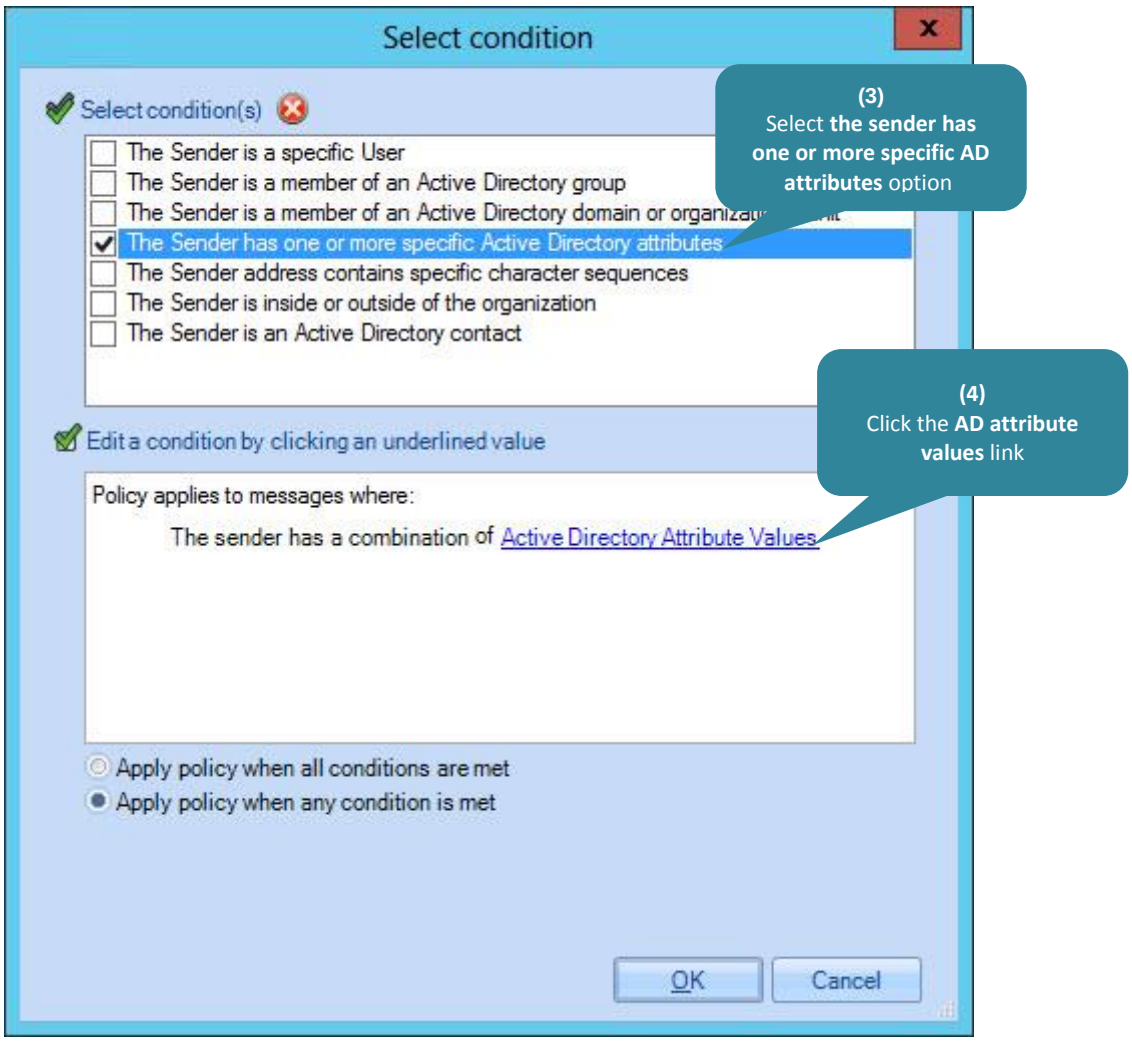
The configure attributes window [pg.100] allows you to define conditions [pg.90] and exceptions [pg.102] based on queries that are run on Active Directory user attributes.

The following example shows how to set a policy condition which uses an Active Directory attribute query. In this scenario, a policy is required to apply a signature for everyone within the 'IT' department of an organization.

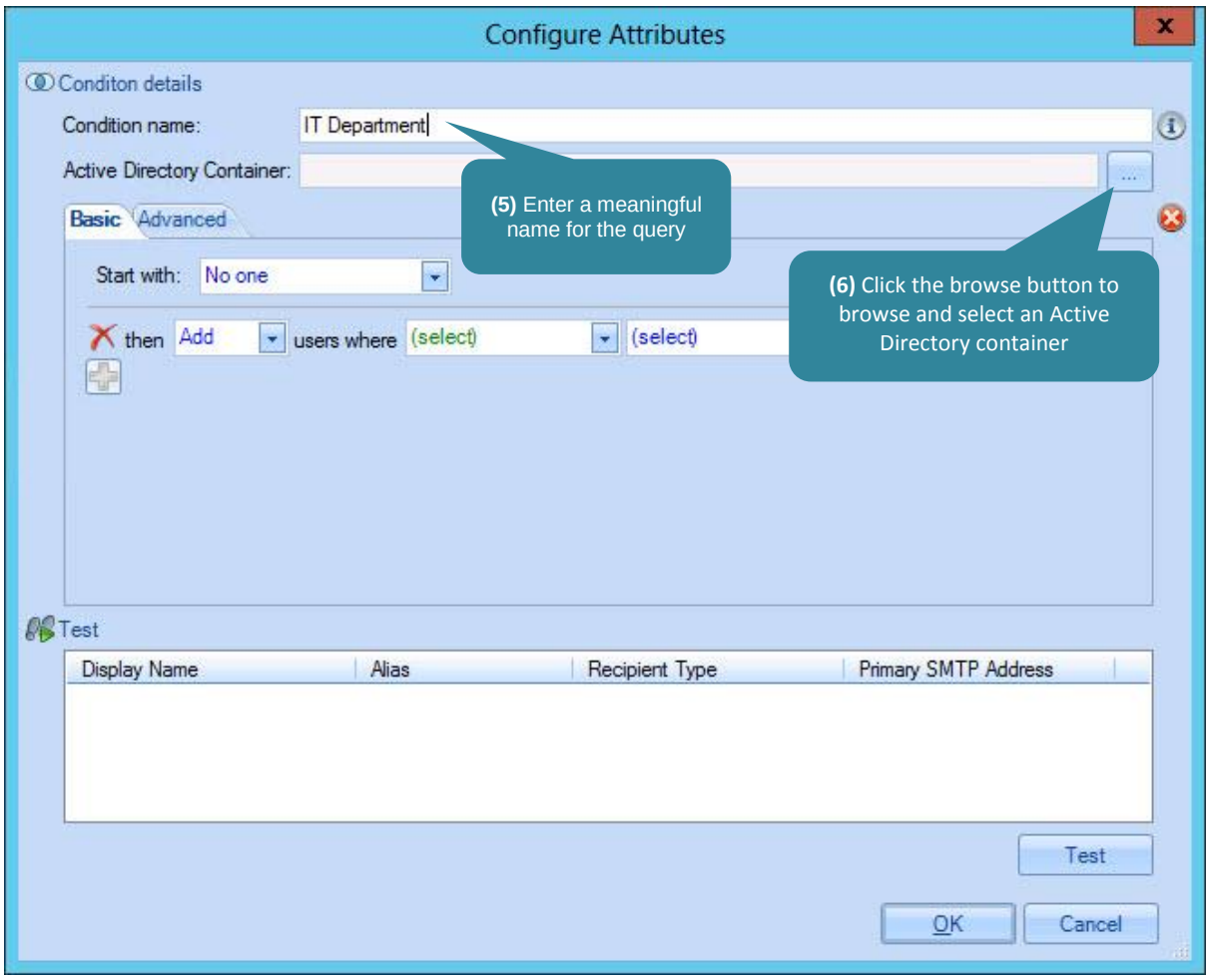
Steps 1 and 2: 'The Sender Is Someone'


IT Department*
Save
Cancel
New
Delete
(1)
Select the sender is someone option
General
Template
Card
Conditions*
Exceptions
Select condition(s)
All Messages
The Sender is someone
The Recipient is someone
The Subject contains specific words or phrases
The Body contains specific words or phrases
One or more message headers contains specific words or character sequences
The Message is a Meeting Request, Update or Response
The Message is a Task Request or Update
No previous policy of this type has been applied
(2)
Click the someone link
Edit a condition by clicking an
Policy applies to messages where:
The sender is someone
Apply policy when all conditions are met
Apply policy when any condition is met

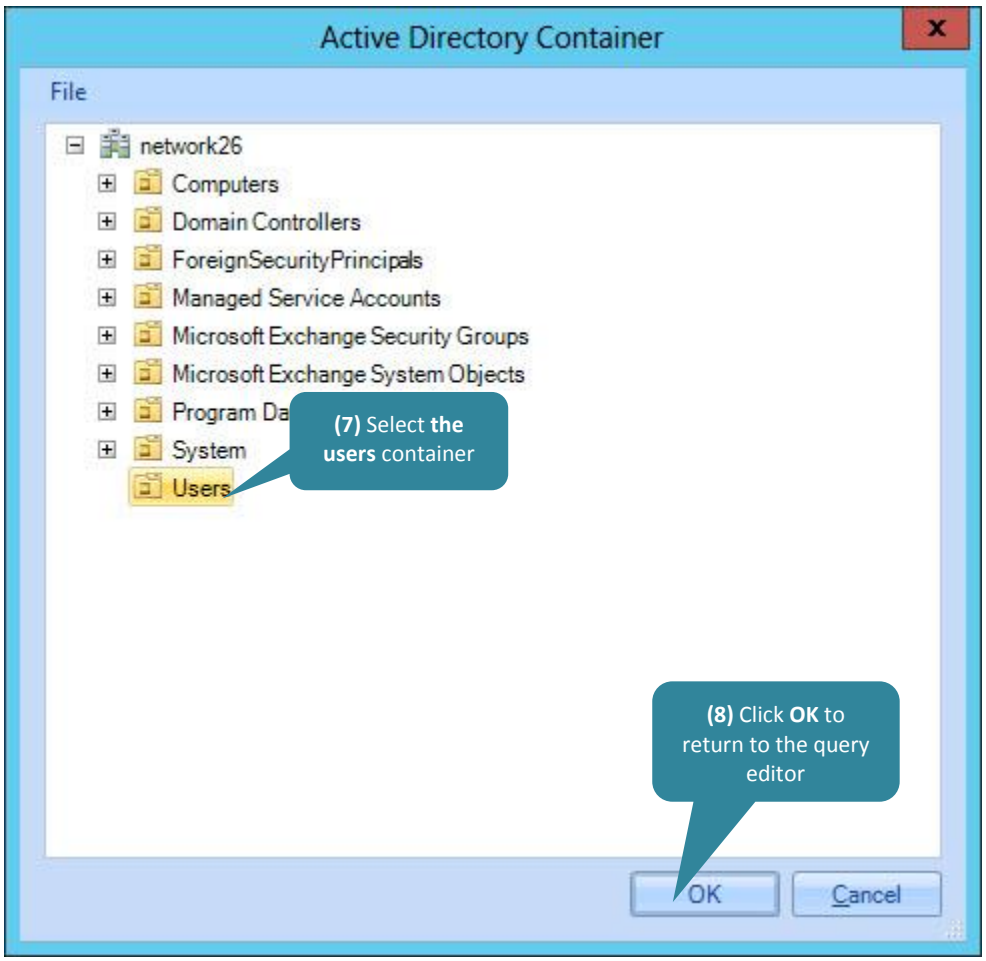
Steps 3 and 4: 'The Sender Has One or More Specific AD Attributes'


Select condition
Select condition(s)
The Sender is a specific User
The Sender is a member of an Active Directory group
The Sender is a member of an Active Directory domain or organizat
The Sender has one or more specific Active Directory attributes
The Sender address contains specific character sequences
The Sender is inside or outside of the organization
The Sender is an Active Directory contact
(3)
Select the sender has one or more specific AD attributes option
Edit a condition by clicking an underlined value
Policy applies to messages where:
The sender has a combination of Active Directory Attribute Values
(4)
Click the AD attribute values link
Apply policy when all conditions are met
Apply policy when any condition is met
OK
Cancel

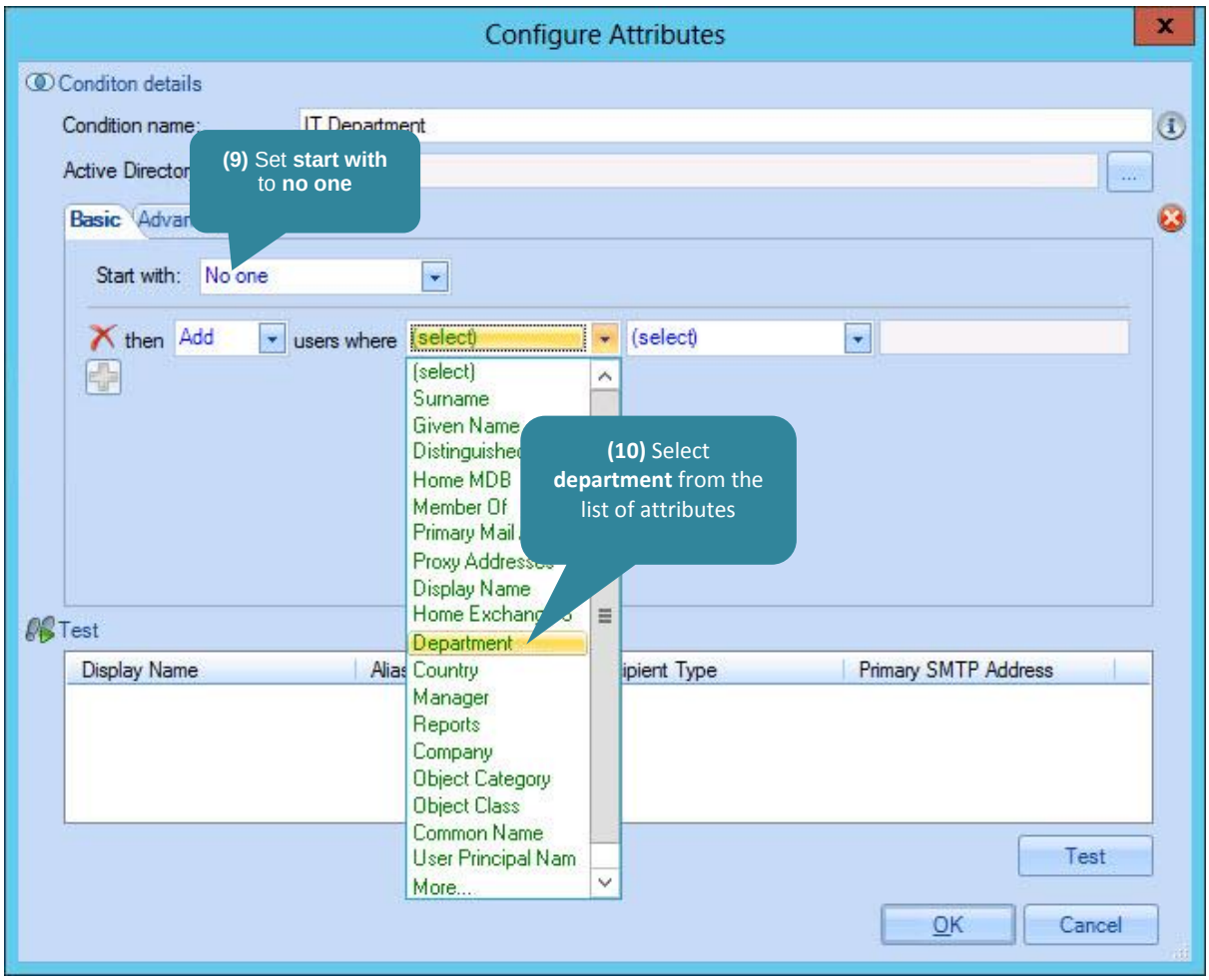
Steps 5 and 6: Enter Basic Details for the Query



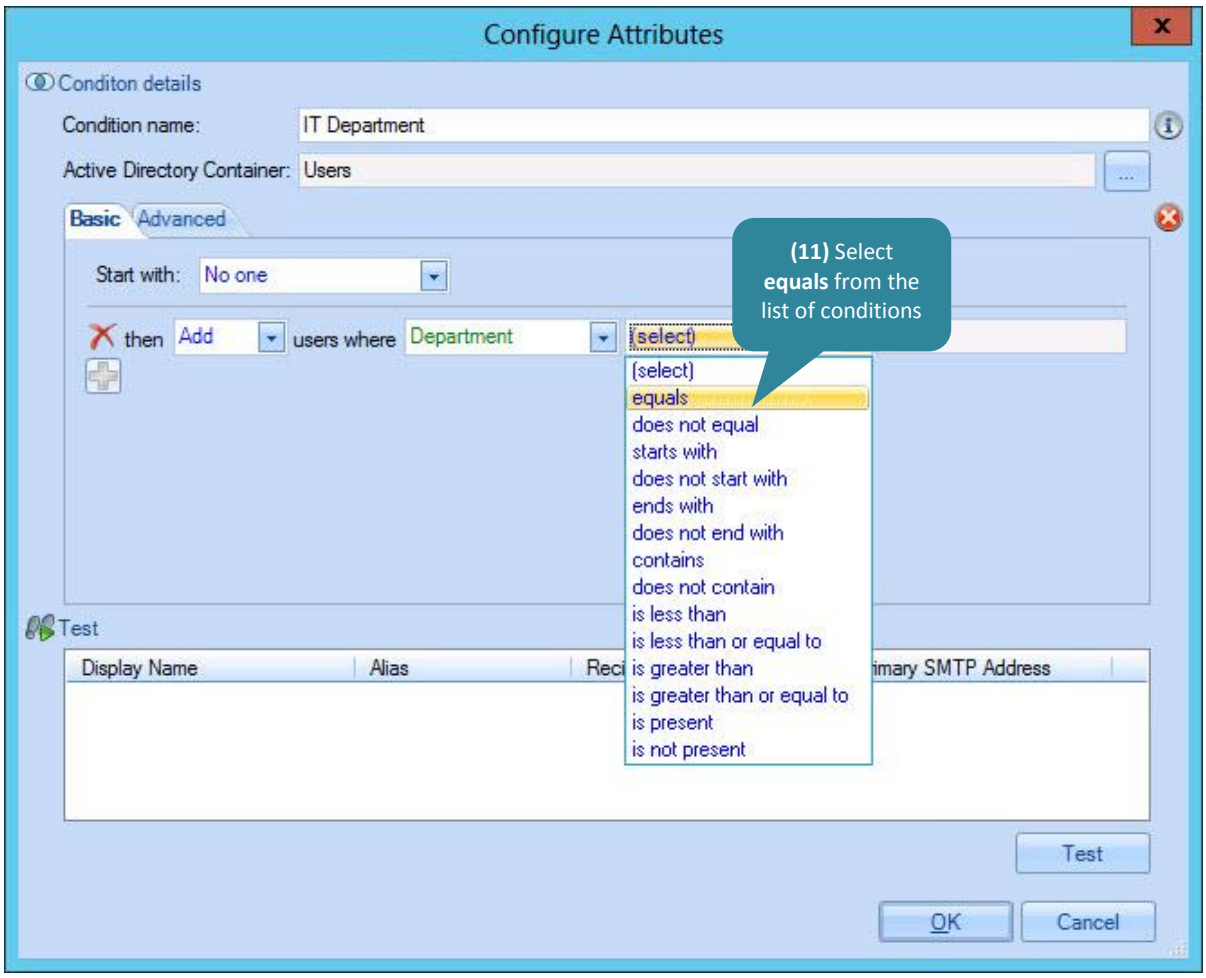
Steps 7 and 8: Browse and Select an Active Directory Container



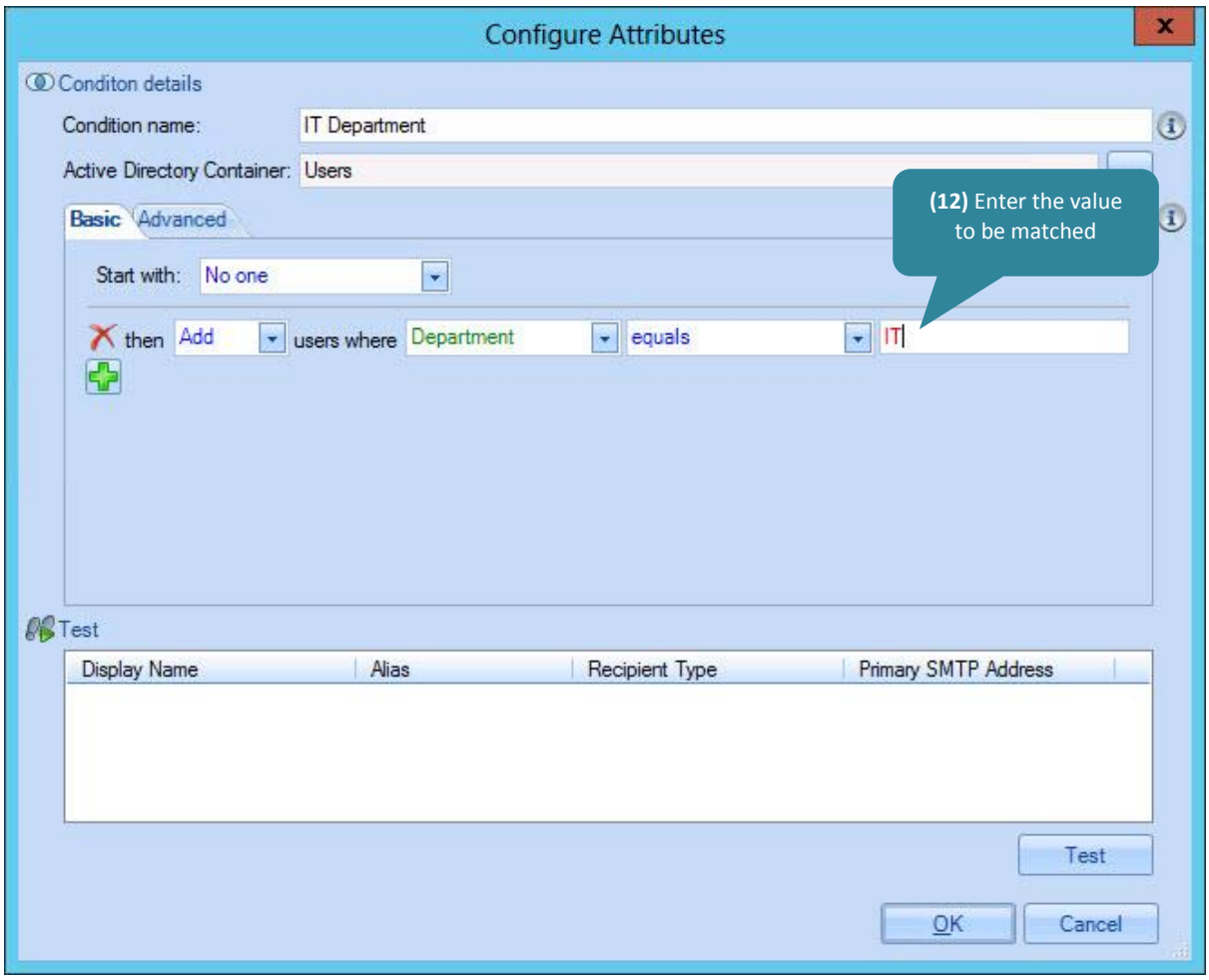
Steps 9 and 10: Choose a Start Point and Select Required Attribute



Step 11: Choose How Matching Should Be Made

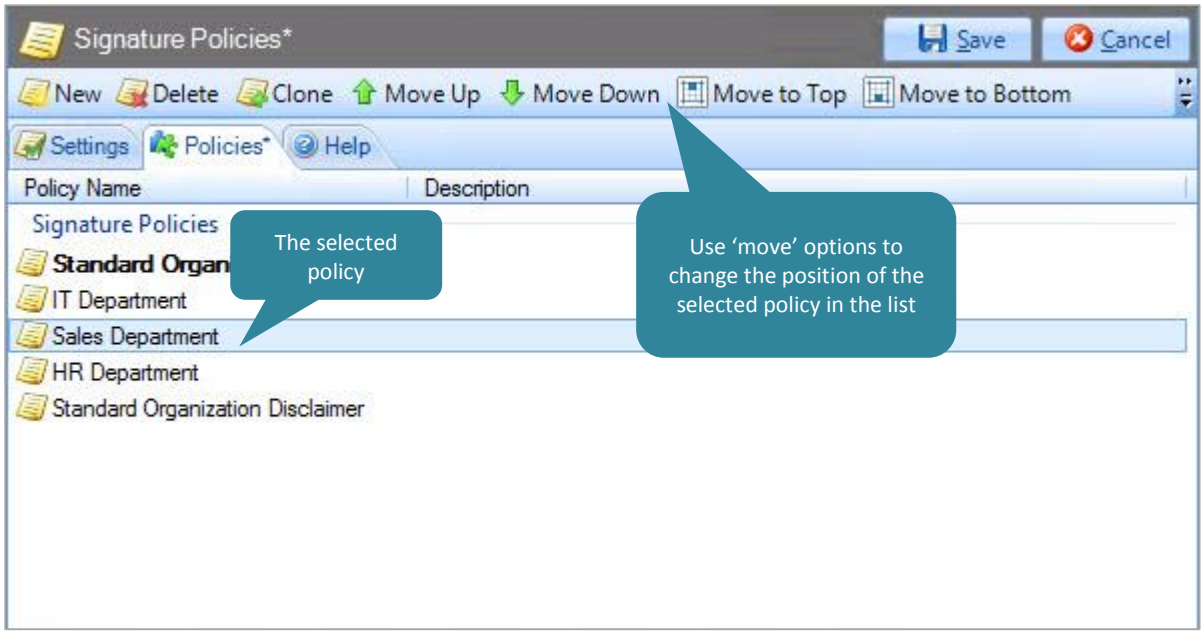


Step 12: Enter the Required Attribute Value for Matching



How Do I Change The Sequence In Which Policies Run?

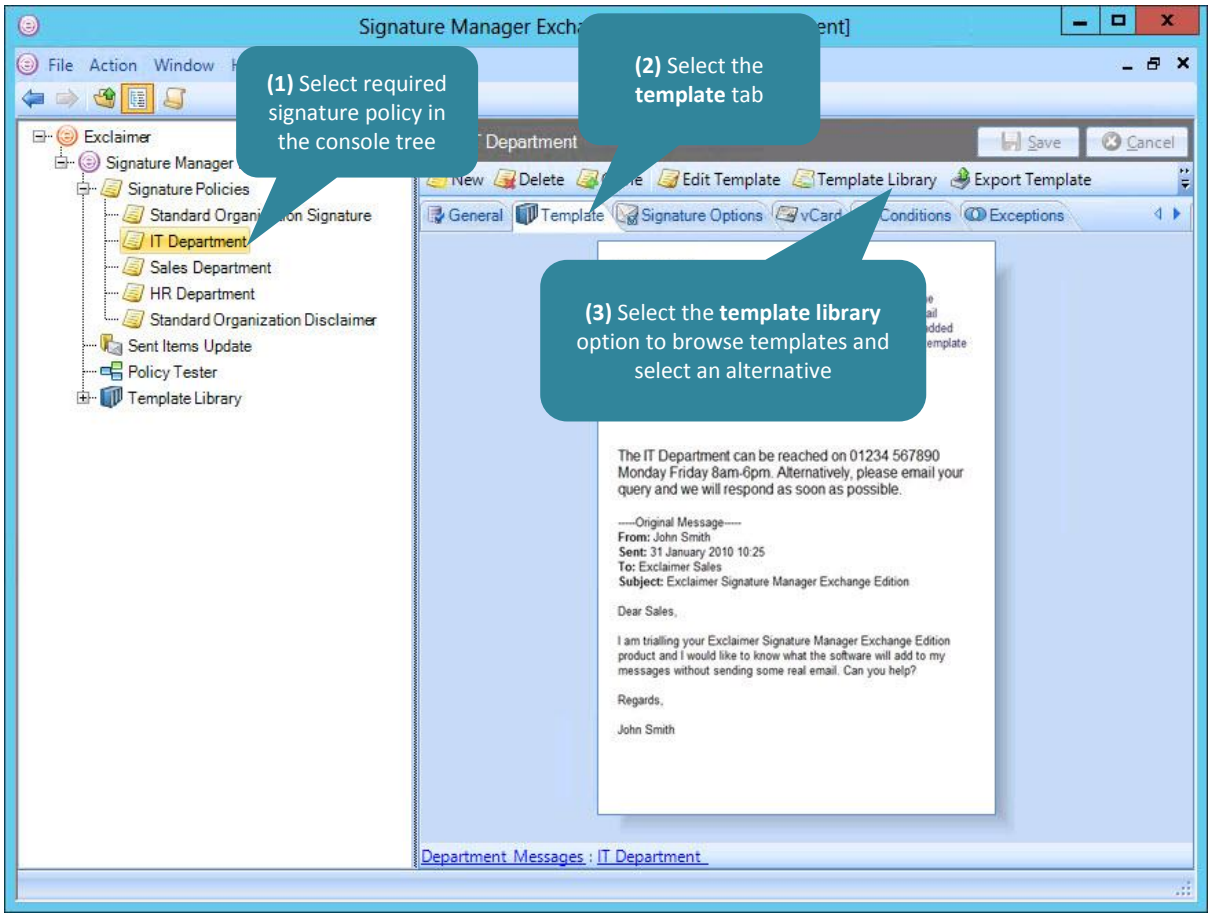
Policies are processed in the order that they are listed in the policies tab [pg.60] (this sequence is also reflected in the console tree [pg.35]). To change the sequence in which policies are listed, access the policies tab and use move up, move down, move to top, move to bottom buttons as required:



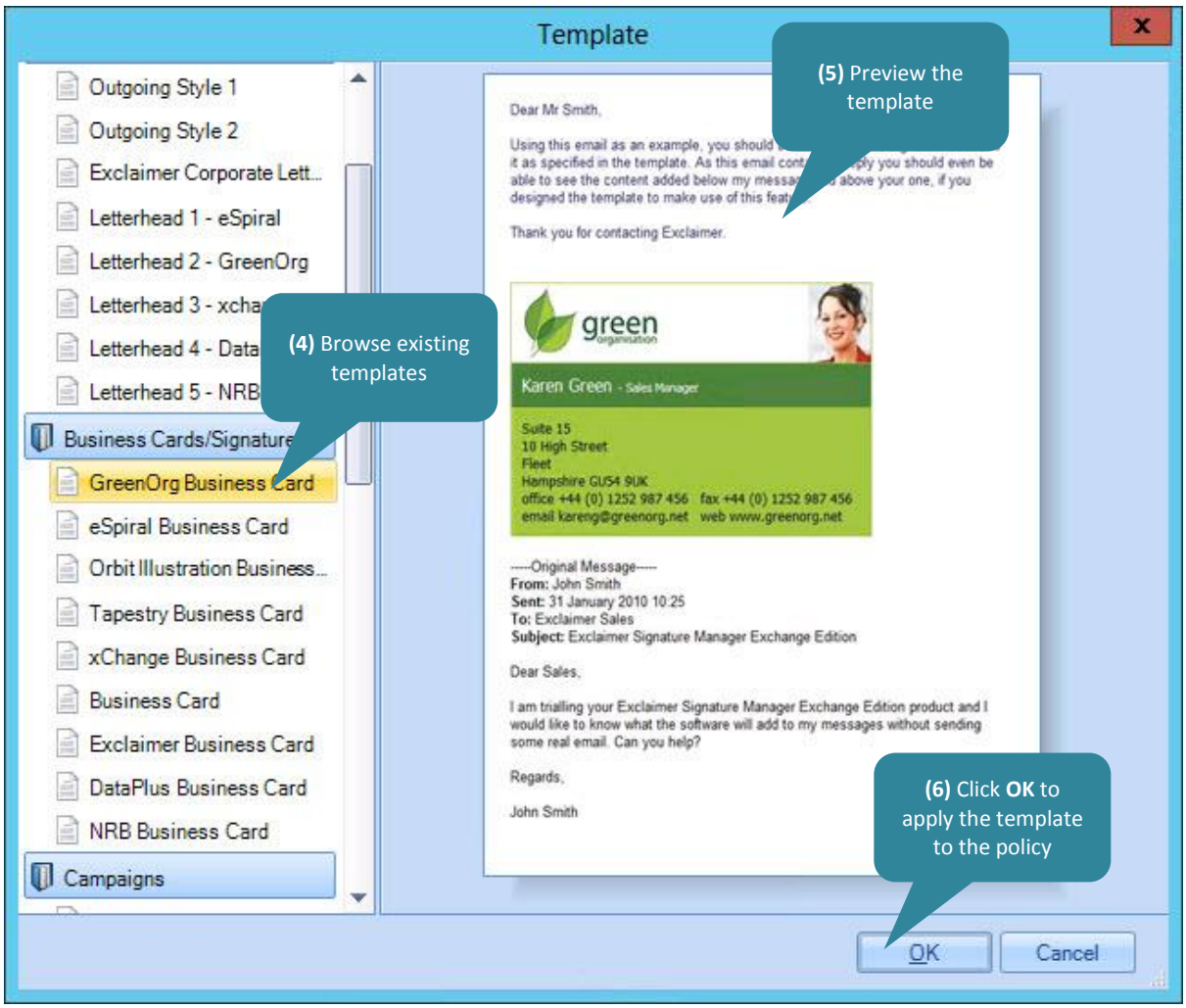
How Do I Change The Template Associated With a Policy?

When viewing the template associated with a policy, you can choose to access the template library [pg.176] and select a new template, as shown below.

Steps 1 - 3: Access the Template Library From Within a Policy


(1) Select required signature policy in the console tree
(2) Select the **template** tab
(3) Select the **template library** option to browse templates and select an alternative
File Action Window
Exclaimer
Signature Manager
Signature Policies
IT Department
Sales Department
HR Department
Standard Organization Disclaimer
Sent Items Update
Policy Tester
Template Library
Department
Save
Cancel
New
Delete
Edit Template
Template Library
Export Template
General
Template
Signature Options
Conditions
Exceptions
The IT Department can be reached on 01234 567890 Monday Friday 8am-6pm. Alternatively, please email your query and we will respond as soon as possible.
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Dear Sales,
I am trialling your Exclaimer Signature Manager Exchange Edition product and I would like to know what the software will add to my messages without sending some real email. Can you help?
Regards,
John Smith
Department Messages : IT Department

Steps 4 - 6: Browse and Select New Templates


Template
(5) Preview the template
(4) Browse existing templates
(6) Click OK to apply the template to the policy
Outgoing Style 1
Outgoing Style 2
Exclaimer Corporate Lett...
Letterhead 1 - eSpiral
Letterhead 2 - GreenOrg
Letterhead 3 - xcha
Letterhead 4 - Data
Letterhead 5 - NRB
Business Cards/Signature
GreenOrg Business Card
eSpiral Business Card
Orbit Illustration Business...
Tapestry Business Card
xChange Business Card
Business Card
Exclaimer Business Card
DataPlus Business Card
NRB Business Card
Campaigns
Dear Mr Smith,
Thank you for contacting Exclaimer.
green
Karen Green - Sales Manager
Suite 15
10 High Street
Fleet
Hampshire GU54 9UK
office +44 (0) 1252 987 456 fax +44 (0) 1252 987 456
email kareng@greenorg.net web www.greenorg.net
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Dear Sales,
I am trialling your Exclaimer Signature Manager Exchange Edition product and I would like to know what the software will add to my messages without sending some real email. Can you help?
Regards,
John Smith
OK
Cancel

Chapter 6

Sent Items Update

Introduction

When email messages are sent and signatures are applied, the message that is finally received at the other end can be quite different to the one you saw when pressing 'send'. Depending on how signature policies and templates were defined, the final message might be displayed in a different way, and signature content may be added.

If required, you can use the sent items update feature to store sent messages exactly as they were received - i.e. with all signature policy settings applied. You can choose to:

- Only store sent items with signatures applied

  -or-

- Store your original message AND a copy of that message with signatures applied

This scenario becomes a little more complex where messages are sent to multiple recipients and different signatures are applied. Should the system split the original email and retain a copy for every person the message is sent to (so you will see how signatures were applied for each recipient), or should just one copy be saved (for the first recipient)?

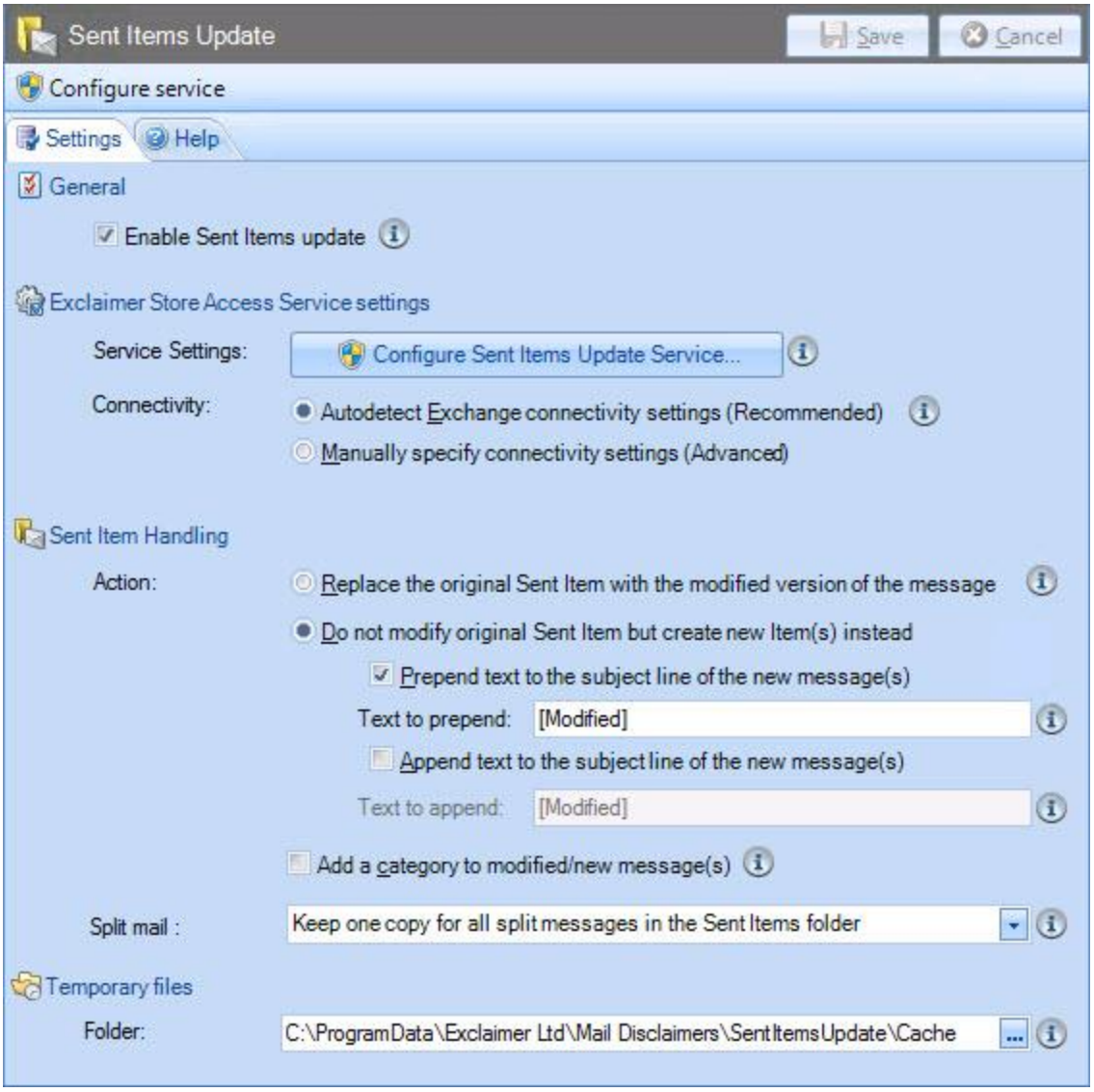
You can define exactly how you would like sent items to work for you, using the sent items update settings [pg.150] page.

NOTE

The **sent items update** feature requires **Microsoft .Net Framework 3.5 SP1**. You can download this from:
http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en
If you do not have this version of the framework, you will not be able to use the **sent items update** feature.

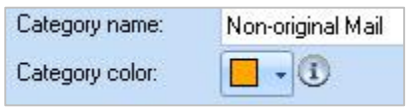
Sent Items Settings

The sent items update feature is configured using the settings tab:


Sent Items Update
Save
Cancel
Configure service
Settings
Help
General
Enable Sent Items update
Exclaimer Store Access Service settings
Service Settings:
Configure Sent Items Update Service...
Connectivity:
Autodetect Exchange connectivity settings (Recommended)
Manually specify connectivity settings (Advanced)
Sent Item Handling
Action:
Replace the original Sent Item with the modified version of the message
Do not modify original Sent Item but create new Item(s) instead
Prepend text to the subject line of the new message(s)
Text to prepend:
[Modified]
Append text to the subject line of the new message(s)
Text to append:
[Modified]
Add a category to modified/new message(s)
Split mail :
Keep one copy for all split messages in the Sent Items folder
Temporary files
Folder:
C:\ProgramData\Exclaimer Ltd\Mail Disclaimers\SentItemsUpdate\Cache

These options are summarized on the following page.

Sent items settings are summarized below:

Option	Summary
General	
Enable Sent Items Update	Use this option to enable or disable sent items functionality.
Exclaimer Store Access Service Settings	
Service Settings	Use the configure sent items update service button to launch the sent items update configuration wizard [pg.153] and setup the service for this feature.
Connectivity	Choose whether to allow the system to automatically detect your Exchange server settings, or to add these settings manually. Typically, manual settings are used if you need to troubleshoot a connectivity problem. If you choose to add settings manually, additional options are displayed: Here, you must provide your Exchange version and URL. The URL is for the Exchange Web Service URL, which should be located under IIS on the Client Access Server.
Sent Item Handling	
Action	Use these settings to determine how sent items should be handled. Choose from: Replace the original Sent Item with the modified version of the message. Use this option if you only wish to keep the modified version of original messages. Do not modify original Sent Item but create new item(s) instead. Select this option to retain the original version of messages and add new items for modified version(s). In this case, you can choose to prepend or append text to the subject line of new (modified) messages, so that they are easier to identify in your Sent Items folder. Another way to help identify new messages in your sent items folder is to apply an Outlook category to them. Select the Add a category to modified/new messages option and specify the required category / color:  Note that category colors are only available for users with a mailbox on an Exchange 2010 server (this feature is not available in Exchange 2007). .../continued

Option	Summary
Split Mail	When a message is sent to multiple recipients and different signatures are required, the message is 'split' for each recipient so that appropriate signatures are applied. Use split mail options to determine what should happen in these cases: If you choose to Keep one copy for all split messages in the Sent Items folder, only one modified message will be saved - this will be the message for the first recipient processed. If you choose to Record all split messages in the Sent Items folder, a modified message will be saved for each recipient.
Temporary Files	
Folder	In order to process sent items, Exclaimer Signature Manager Exchange Edition needs a location in which temporary files can be processed. Use this option to specify the required folder for these files.

NOTE

The **sent items update** feature requires **Microsoft .Net Framework 3.5 SP1**. You can download this from:
http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en
If you do not have this version of the framework, you will not be able to use the **sent items update** feature.

The Sent Items Update Configuration Wizard

The sent items update configuration wizard is used to configure the service that is used by the sent items update feature. To access this wizard, click the configure sent items update service button from the settings [pg.150] tab, then follow on-screen instructions as shown below.

NOTE

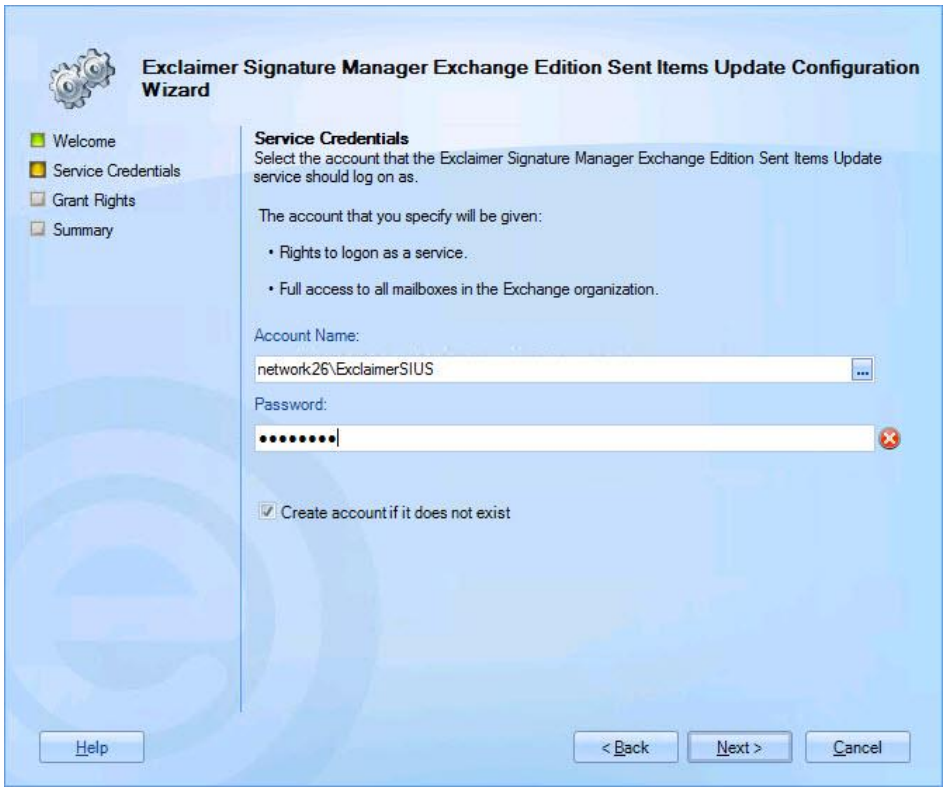
The **sent items update** feature requires **Microsoft .Net Framework 3.5 SP1**. You can download this from: http://www.microsoft.com/downloads/details.aspx?familyid=AB99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en

If you do not have this version of the framework, you will not be able to use the sent items update feature.

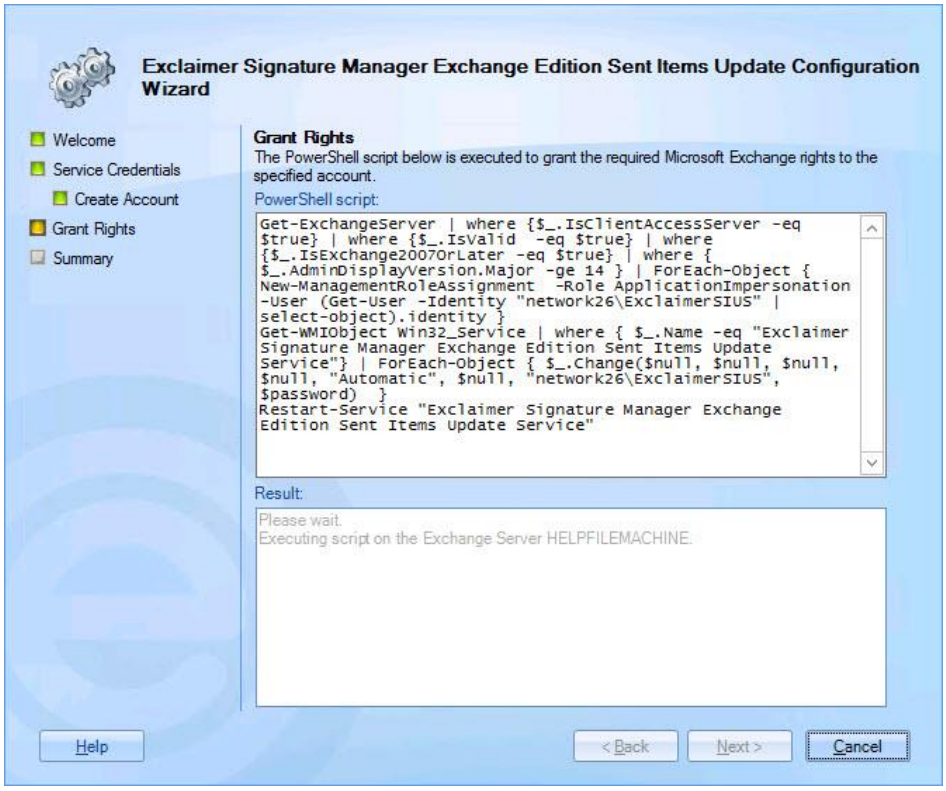
1. The welcome page provides summary information about the configuration process. It also includes an option that should only be selected if you have manually configured your service account:

Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
Welcome
Service Credentials
Grant Rights
Summary
Welcome
Welcome to the Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
This wizard will guide you through the configuration of the service used by the Sent Items update feature. This feature ensures that when Exclaimer Signature Manager Exchange Edition processes an internal or outbound message, the changes are written back to the Sent Items folder of the user who sent it.
During this wizard you will:
• Set up an account and password for the service to use for logon.
• Give this account 'logon as a service' rights.
• Give this account full access to all mailboxes in the Exchange organization.
• Start the Exclaimer Signature Manager Exchange Edition Sent Items Update service.
I have manually created the service account and assigned the appropriate rights.
Why would I need to configure the service account manually and how do I do it?
Help
< Back
Next >
Cancel

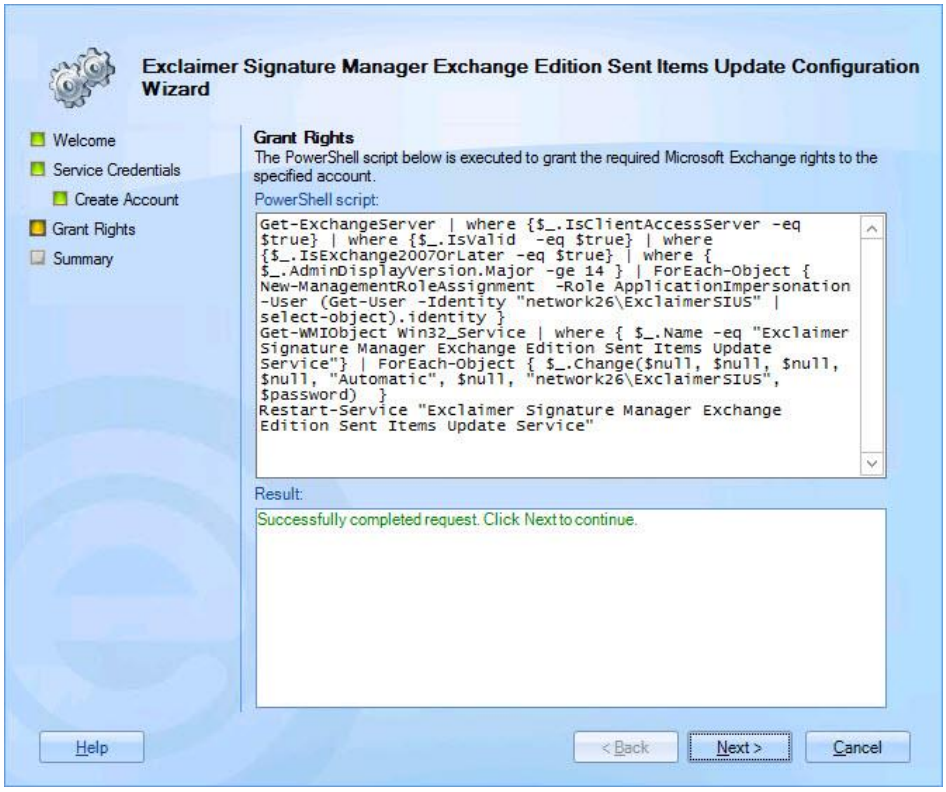
2. If you have manually configured your service, select the I have manually created the service account... option and then click next. Otherwise, just click next to set service credentials:


Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
Welcome
Service Credentials
Grant Rights
Summary
Service Credentials
Select the account that the Exclaimer Signature Manager Exchange Edition Sent Items Update service should log on as.
The account that you specify will be given:
• Rights to logon as a service.
• Full access to all mailboxes in the Exchange organization.
Account Name:
network26\ExclaimerSIUS
Password:
Create account if it does not exist
Help
< Back
Next >
Cancel

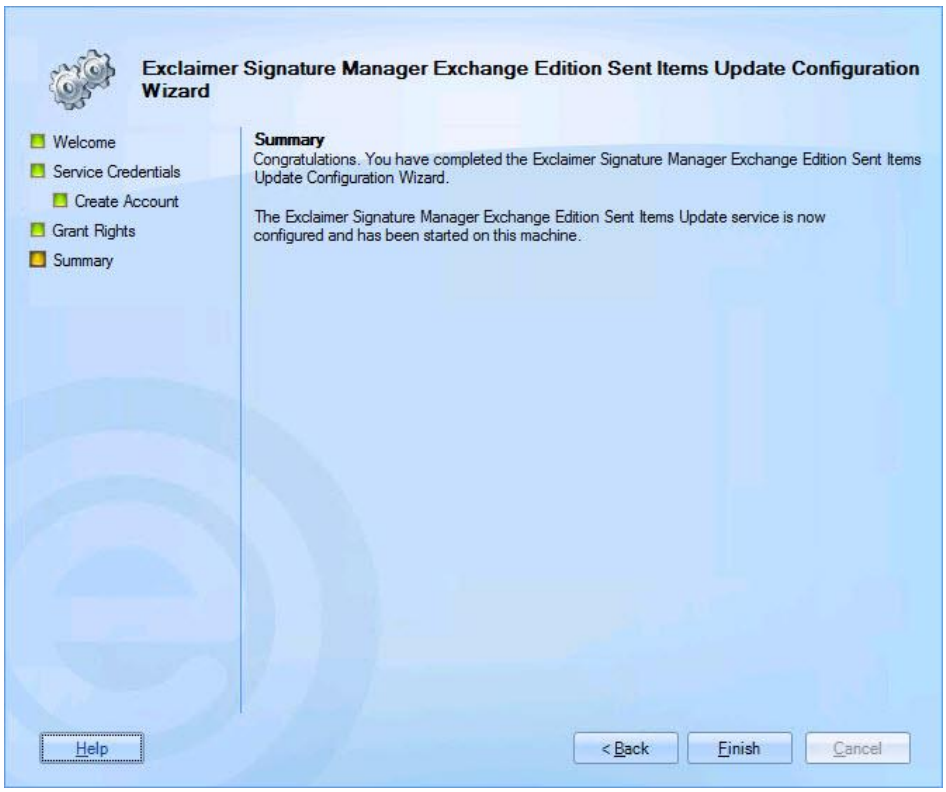
3. Enter an account name and password for an account that this service can use to log on, then click next to grant rights for this user (if you have chosen to create a new user, it will be created):


Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
Welcome
Service Credentials
Create Account
Grant Rights
Summary
Grant Rights
The PowerShell script below is executed to grant the required Microsoft Exchange rights to the specified account.
PowerShell script:
Get-ExchangeServer | where {$_.IsClientAccessServer -eq $true} | where {$_.IsValid -eq $true} | where {$_.IsExchange2007OrLater -eq $true} | where { $_.AdminDisplayVersion.Major -ge 14 } | ForEach-Object { New-ManagementRoleAssignment -Role ApplicationImpersonation -User (Get-User -Identity "network26\ExclaimerSIUS" | select-object).identity }
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "network26\ExclaimerSIUS", $password) }
Restart-Service "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"
Result:
Please wait.
Executing script on the Exchange Server HELPFILEMACHINE.
Help
< Back
Next >
Cancel

Processing takes place and rights are granted:


Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
Welcome
Service Credentials
Create Account
Grant Rights
Summary
Grant Rights
The PowerShell script below is executed to grant the required Microsoft Exchange rights to the specified account.
PowerShell script:
Get-ExchangeServer | where {$_.IsClientAccessServer -eq $true} | where {$_.IsValid -eq $true} | where {$_.IsExchange2007OrLater -eq $true} | where { $_.AdminDisplayVersion.Major -ge 14 } | ForEach-Object { New-ManagementRoleAssignment -Role ApplicationImpersonation -User (Get-User -Identity "network26\ExclaimerSIUS" | select-object).identity }
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "network26\ExclaimerSIUS", $password) }
Restart-Service "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"
Result:
Successfully completed request. Click Next to continue.
Help
< Back
Next >
Cancel

4. Click next to complete the configuration wizard:


Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard
Welcome
Service Credentials
Create Account
Grant Rights
Summary
Summary
Congratulations. You have completed the Exclaimer Signature Manager Exchange Edition Sent Items Update Configuration Wizard.
The Exclaimer Signature Manager Exchange Edition Sent Items Update service is now configured and has been started on this machine.
Help
< Back
Finish
Cancel

5. Click finish to exit the wizard.

Sent Items Update Service - Manual Configuration

To configure the Sent Items Update Service manually, the following steps are required:

1. Create a user [pg.156]
2. Grant rights [pg.158]
3. Configure the service to use new credentials [pg.159]

These steps are detailed in the following sections.

Step 1: Create a User

There are two possible ways to create a new user - use ONE of the methods detailed below:

Use Exchange Management Console

A new user can be created by completing a Microsoft Exchange wizard:

1. From Microsoft Exchange, select Recipient Configuration > Mailbox > New Mailbox
2. Set User Mailbox as a mailbox type.
3. Having completed this wizard, it is advisable to hide the new mailbox from the Global Address List (this ensures that people will not be able to see this user from their email clients). To do this, run the following script:

```
Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter
The Users Identity ###"
```

NOTE

Note that elements surrounded by '**### ... ###**' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to additional guidelines for creating a new user [pg.157] on the following page.

Use a PowerShell Script

The following script can be run in the Exchange Management Shell:

```
New-Mailbox -Name "### Enter a username ###" -UserPrincipalName "### Enter the domain username ###" -ResetPasswordOnNextLogon $false -Database "### Enter the Mailbox Database ###"

Set-Mailbox -HiddenFromAddressListsEnabled $true -Identity "### Enter The Users Identity ###"
```

This script will create the user and hide the new mailbox from the Global Address List. Please also refer to additional guidelines for creating a new user [pg.157] below.

NOTE

Note that elements surrounded by '**### ... ###**' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Please also refer to additional guidelines for creating a new user [pg.157] below.

Additional Guidelines for Creating a New User

The following guidelines should be considered when creating a new user using either of the methods described above:

- The user should have no password expiration policy (i.e. the password should never expire).
- The user should NOT be a member of Domain Admins or Enterprise Admins groups, since they are explicitly denied access to Exchange mailboxes by default Exchange settings.
- The user should have LogonAsService rights (these will be granted if necessary during step 3 [pg.159]).
- Care should be taken when creating this user because it will have full access to email for all users on the Exchange server.
- There is no requirement for the user to have an Exchange mailbox.

Step 2: Grant Rights

PowerShell scripts are provided below to grant rights. Please note the following regarding mixed environments:

- If you have a mixed environment which includes Exchange 2007 and Exchange 2010 and/or Exchange 2013 machines, the appropriate script should be run on one of each type. In other words, the 2007 script [pg.158] should be run on Exchange 2007 and the 2010 / 2013 script [pg.159] should be run on Exchange 2010 / Exchange 2013 (see next point).

- Exchange 2013 works in the same way as Exchange 2010. So, if you have a mixed environment which includes Exchange 2007, Exchange 2010, and Exchange 2013 machines, the 2007 script [pg.158] should be run on Exchange 2007 and the 2010 / 2013 script [pg.159] should be run on Exchange 2010 **or** Exchange 2013.

- If you have added a new Exchange 2007 server or a new Exchange 2007 database to the existing infrastructure, the 2007 script [pg.158] must be run again to grant necessary rights to new servers or databases. Similarly, the 2010 / 2013 script [pg.159] must be run again if you add a new Exchange 2010 / 2013 server or a new Exchange 2010 / 2013 database.

Exchange 2007

If you are using Exchange 2007, use the Grant Exchange Rights script below:

```
Get-ExchangeServer | where {$_.IsClientAccessServer -eq $true} | where
{$_.IsValid  -eq $true} | where {$_.IsExchange2007OrLater -eq $true} |
where { $_.AdminDisplayVersion.Major -eq 8 } | ForEach-Object {Add-
ADPermission -Identity $_.distinguishedname -User (Get-User -Identity
"### Enter The Users Identity ###" | select-object).identity -
accessRights GenericRead, GenericWrite -extendedRights Send-As, Receive-
As, ms-Exch-Store-Admin, ms-Exch-EPI-Impersonation -InheritanceType All }

Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity
$_.DistinguishedName -User (Get-User -Identity "### Enter The Users
Identity ###" | select-object).identity  -ExtendedRights ms-Exch-EPI-
May-Impersonate}
```

NOTE

Note that elements surrounded by '**### ... ###**' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing.

Exchange 2010 / Exchange 2013

If you are using Exchange 2010 or Exchange 2013, use the Grant Exchange Rights script below:

```
$ExchangeServer = Get-ExchangeServer | where {$_.IsClientAccessServer
-eq $true} | where {$_.IsValid -eq $true} | where
{$_.IsExchange2007OrLater -eq $true} | where {
$_.AdminDisplayVersion.Major -ge 14 }

$ExchangeServer | ForEach-Object { New-ManagementRoleAssignment -Role
ApplicationImpersonation -User (Get-User -Identity "### Enter The
Users Identity ###" | select-object).identity }
```

NOTE

Note that elements surrounded by '**### ... ###**' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing.

Step 3: Configure the Service to Use Credentials

There are two possible ways to configure the service to use new credentials - use ONE of the methods described below:

Use the Services Applet

1. Access the Services applet (Control Panel > Administrative Tools > Services).
2. Locate the Exclaimer Signature Manager Exchange Edition Sent Items Update service.
3. Right click on this service and select Properties.
4. Select the Log On tab.
5. Click the Browse button and locate the user created in step 1 [pg.156].
6. Type the user's password and click OK to complete the process.
7. Ensure that the service starts with the new user's credentials and that its startup type is set to Automatic.

Use a PowerShell Script

The following script can be run in the Exchange Management Shell:

Exchange 2007

If you are using Exchange 2007, use the Set Service Rights script below:

```
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "### Enter the domain username ###", password)  }
Restart-Service "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"
```

Exchange 2010 / Exchange 2013

If you are using Exchange 2010 or Exchange 2013, use the Set Service Rights script below:

```
Get-WMIObject Win32_Service | where { $_.Name -eq "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"} | ForEach-Object { $_.Change($null, $null, $null, $null, "Automatic", $null, "### Enter The Users Identity ###", password)  }
Restart-Service "Exclaimer Signature Manager Exchange Edition Sent Items Update Service"
```

NOTE

Note that elements surrounded by '**### ... ###**' should be substituted with information as indicated - remove the hash (#) symbols and maintain spacing. Also note that the instance of **password** should be replaced with the appropriate password for the user account.

Chapter 7

The Policy Tester

Introduction

The policy tester is used to create a test email and simulate the sending process. When a test is run, any defined policies are processed, so you can ensure that the correct signatures are applied to messages.

Messages generated in the policy tester are never actually sent, so you can select whichever sender and recipient is most appropriate for testing a policy, without concern. Using the policy tester, you can:

- Define a test message [pg.167]
- Save a test message for later use [pg.168]
- Load a saved message for testing [pg.168]

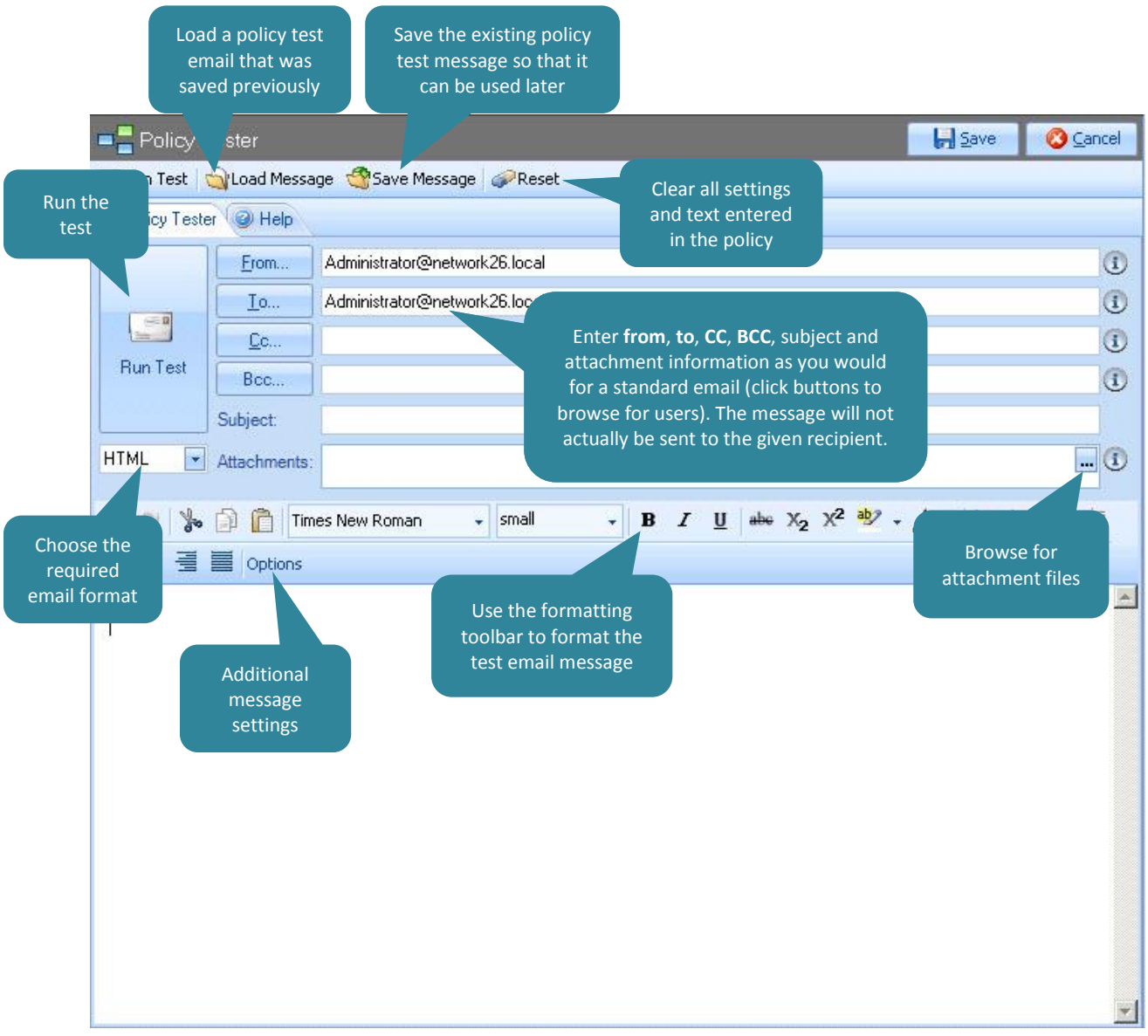
Then, having run a test, you access a process diagram [pg.170] and:

- View which signature policies have and have not been applied [pg.170]
- Check the reason why a signature policy is or is not applied [pg.172]
- Preview the message at any stage in the process [pg.173]

Finally, you can view original messages and their final output [pg.174].

Understanding the Policy Tester Window

The policy tester is designed to emulate Microsoft Outlook as closely as possible, so it will be familiar to most users:


Load a policy test email that was saved previously
Save the existing policy test message so that it can be used later
Run the test
Clear all settings and text entered in the policy
Enter from, to, CC, BCC, subject and attachment information as you would for a standard email (click buttons to browse for users). The message will not actually be sent to the given recipient.
Choose the required email format
Browse for attachment files
Use the formatting toolbar to format the test email message
Additional message settings
Save
Cancel
Load Message
Save Message
Reset
Help
Run Test
From...
To...
Cc...
Bcc...
Subject:
Attachments:
HTML
Times New Roman
small
Options

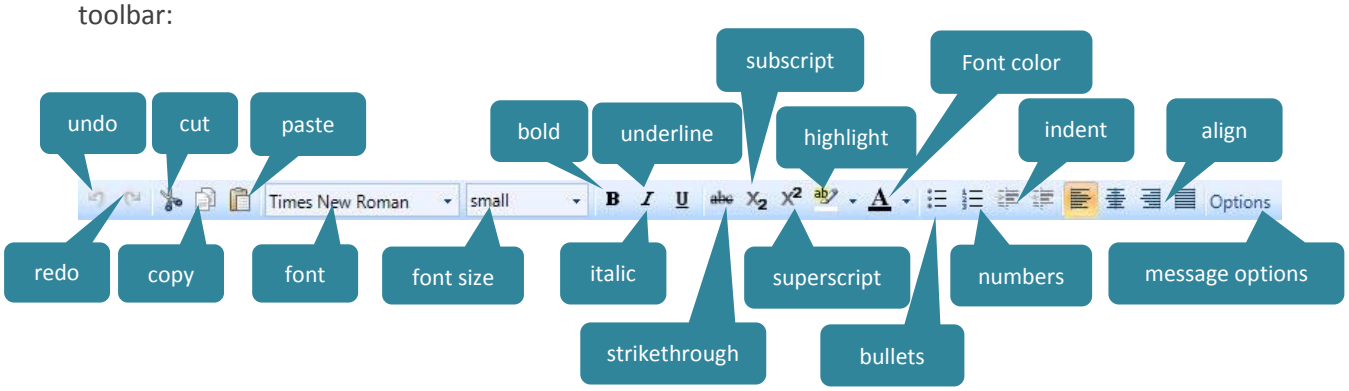
The upper section provides access to the policy tester toolbar [pg.164], and is used to define standard email details (such as sender and recipient) and the lower section contains an editor, so you can type the body of the test email. From here you can create a new message [pg.167] using the editor, save a message for re-use [pg.168], or load a previously saved message [pg.168] for testing.

The Policy Tester Toolbar

Toolbar option	Summary
Run Test	Having set required test criteria, use this option to run the current policy test (or use the large run test button in the main section of the policy tester)
Load Message	Rather than create a new policy test, choose this option to re-use a previously saved test [pg.169].
Save Message	Having set required criteria, use this option to save the existing test for re-use [pg.168].
Reset	Use this option to clear all settings in the policy tester and start from a 'clean' point.

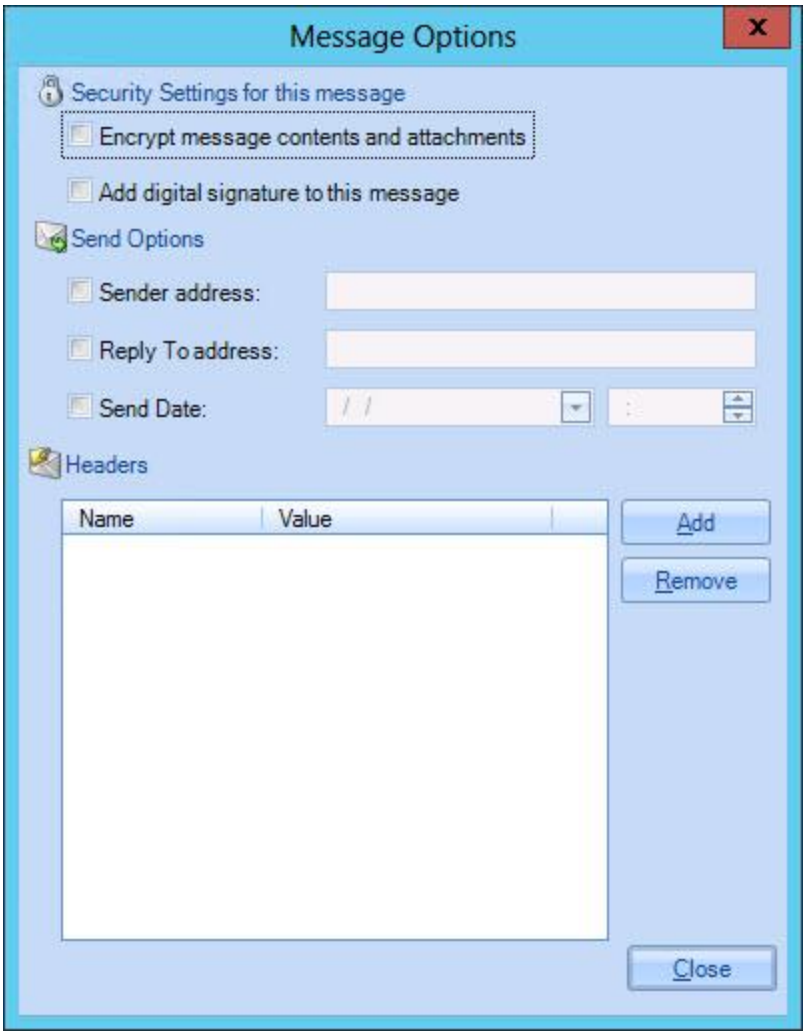
The Formatting Toolbar

The policy tester editor incorporates familiar word processing functionality, using a formatting toolbar:



Additional Options

The policy tester is designed to emulate Microsoft Outlook as closely as possible, therefore additional options are provided so that you can test the full range of conditions [pg.90] and exceptions [pg.102]. When the options button is selected from the editor toolbar, message options are displayed, as shown below:



These options are summarized on the following page.

Message options are summarized below:

Toolbar option	Summary
Security Settings Encrypt message contents and attachments	Select this option to encrypt the test message and any associated attachments. Selecting this option simulates the behavior of Microsoft Outlook, encrypting the message (and any attachments) so that the message cannot be intercepted and examined en-route to the recipient(s).
Add digital signature to this message	Select this option to apply a digital signature to the test message. Not to be confused with Exclaimer Signature Manager Exchange Edition signatures, this option refers to the addition of a digital certificate (from one of many online providers). Messages with a digital certificate may be examined en-route to the recipient(s) but any attempt to change the message, attachments and/or recipient(s) will invalidate the certificate and the recipient(s) will be warned of this as soon as they open the message.
Send Options Sender address	If you are testing a signature policy which has been defined with a sender is someone condition and you need to test send on behalf of behavior (for example, where a secretary sends emails on behalf of a manager), you can specify a particular 'sender' here. For further information please refer to sender is someone [pg.93] and conditions - options summary [pg.92].
Reply to address	Specify an email address to which replies should be directed. In some situations, responses to an email message need to be directed to another mailbox - for example, a sales mailshot might be sent from the Sales Director but any replies should be sent to a general 'Sales' email address, to be handled by the Sales team as a whole.
Send date	If you are testing a policy which is date critical (for example, if you have defined particular date range [pg.112] criteria), you can specify a particular send date to be applied to the test message.
Headers If you are testing a policy which is defined to apply a signature based upon a specific email header, use these options to add that header to the test email.	

Creating a New Policy Test

To create a new policy test, follow the steps below:

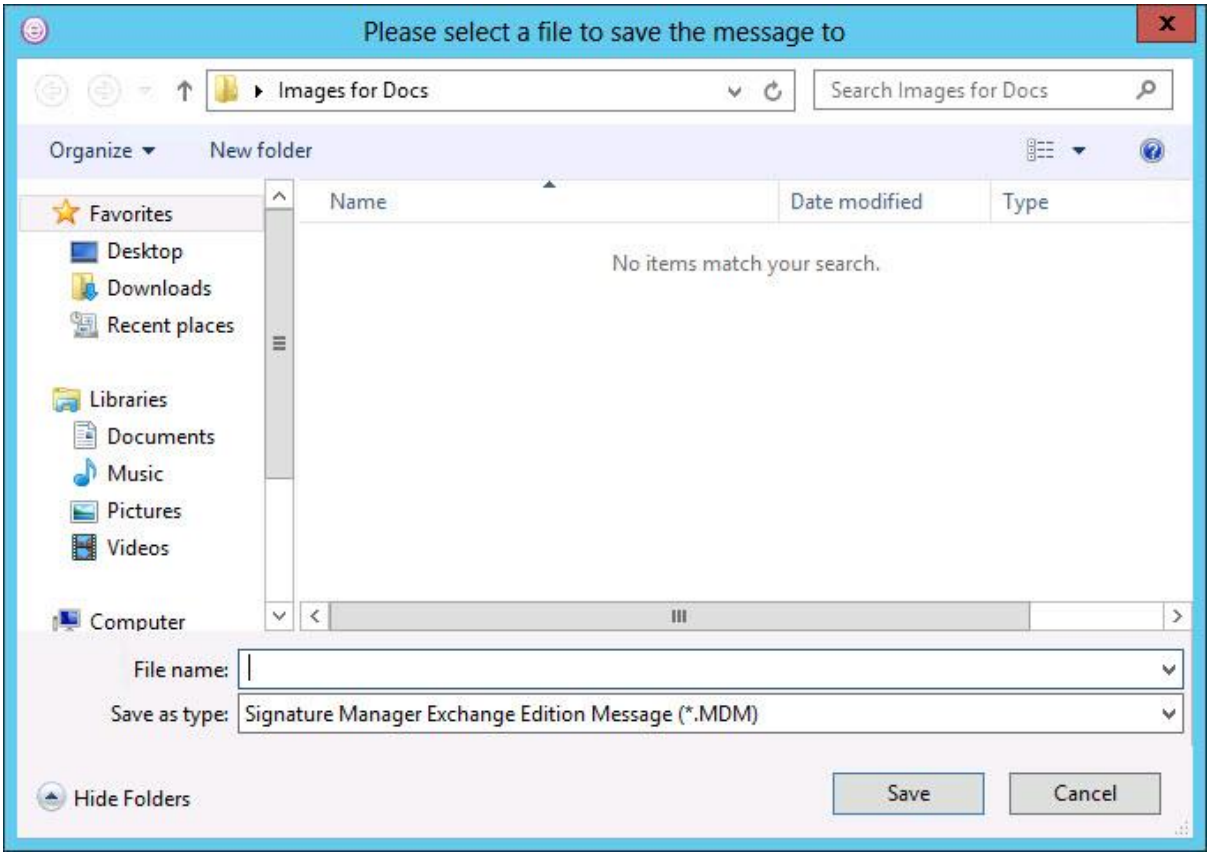
1. Ensure that policies are in the correct sequence on the policy list [pg.74].
2. Select the policy tester.
3. Enter to and from information.
4. Enter CC and BCC information, if required.
5. Add attachments, if required.
6. Choose whether to test the email in HTML, RTF or plain text format.
7. Compose and format required email text in the policy tester editor [pg.163].
8. Set security, delivery and header [pg.165] options, if required.
9. Select the run test option.

Saving & Re-Using a Policy Test

Settings for the policy tester are retained until you close Exclaimer Signature Manager Exchange Edition. If required, you can choose to save the current settings for use at a later date [pg.169].

Saving a Policy Test

To save a policy test, ensure that options are set as required and click save message from the policy tester toolbar [pg.164], then choose a location and filename for the saved policy test:



NOTE

Saved policy test files have an **.MDM** file extension.

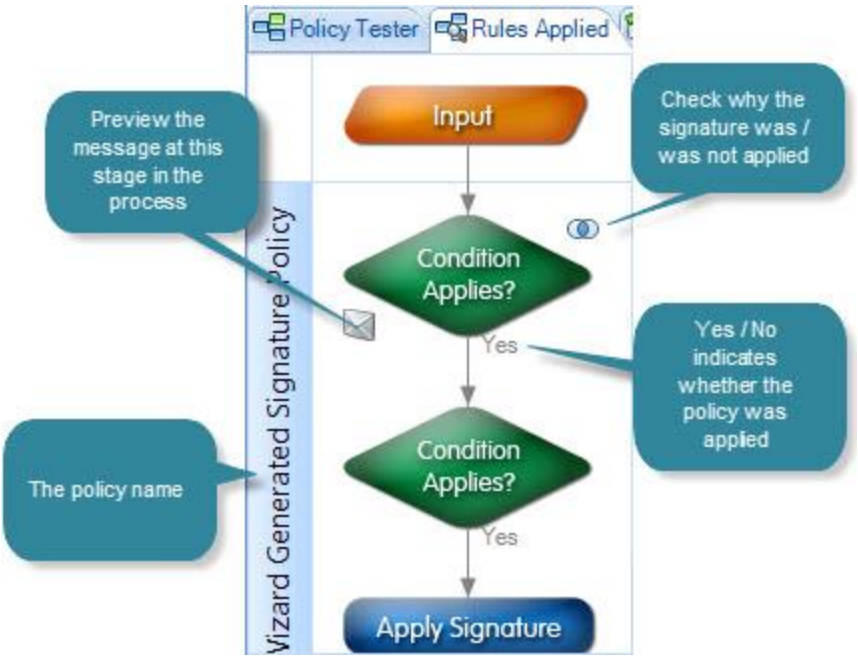
Re-Using a Saved Policy Test

When a saved policy is loaded into the policy tester, fields within the policy are automatically populated with settings from the saved file.

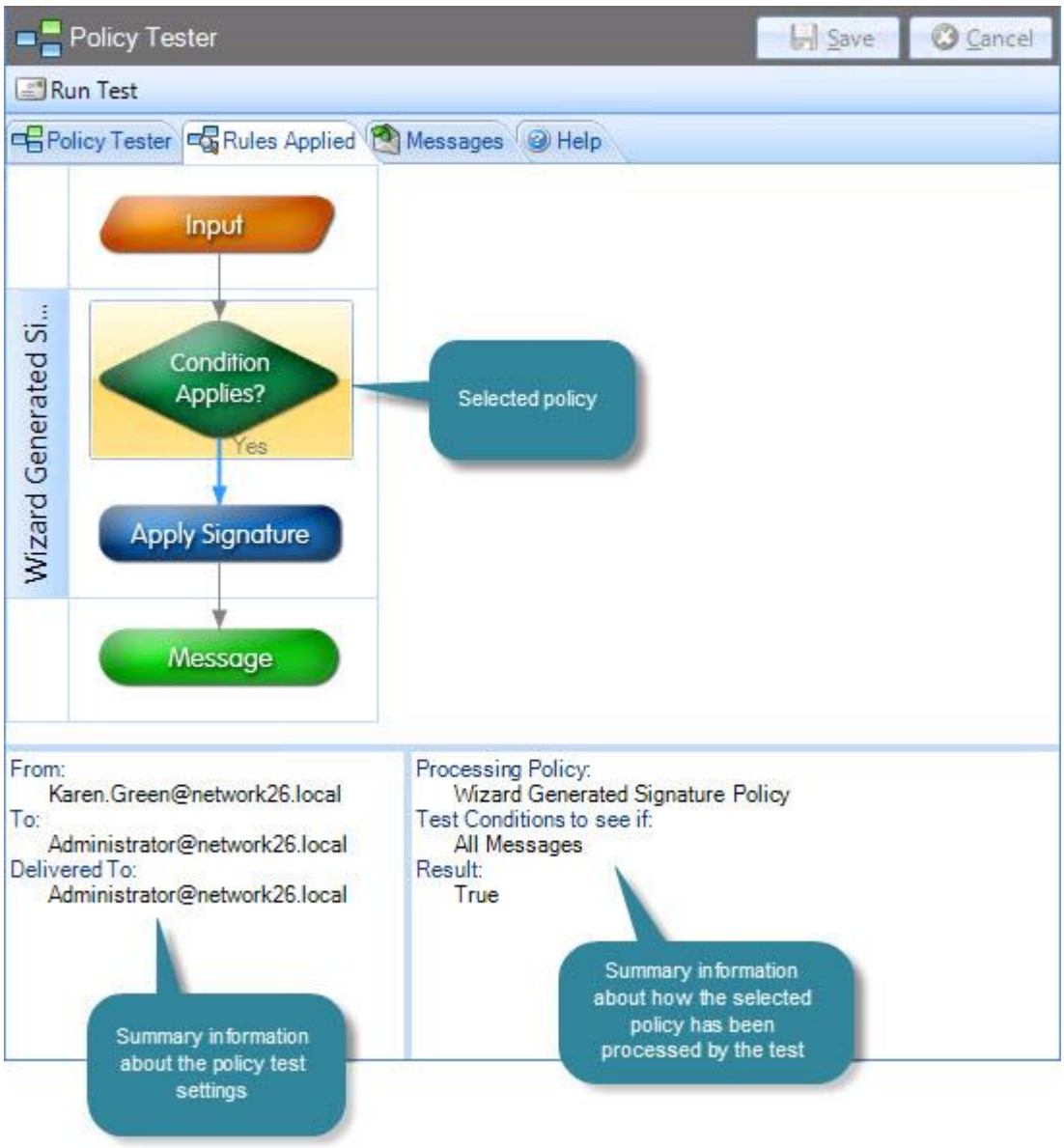
To load a saved policy into the policy tester, click load message from the policy tester toolbar [pg.164]; then navigate drives and folders to select the required policy test file.

Working With Rules Applied Information

Having run a policy test, an additional tab named rules applied is displayed. From here, you can view the outcome of the policy test as a process diagram. Here, each policy processed is displayed with a yes or no indicator, so you can see if the policy was applied. When you hover the cursor over a segment of the diagram, additional options are displayed:

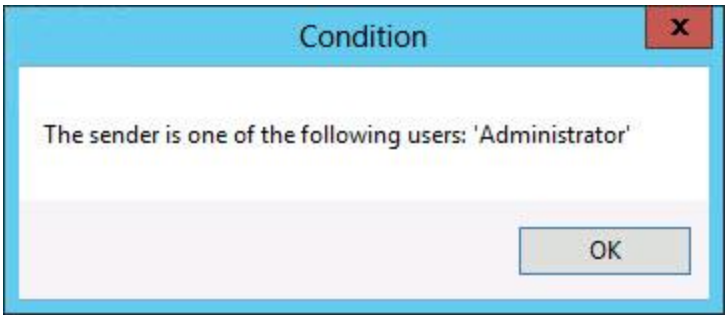


At the bottom of the rules applied window, summary information is available. From here, you can view basic settings for the policy test, and an explanation of how the selected policy has been processed (at a selected stage):



Checking the Reason Why A Signature Policy Is or Is Not Applied

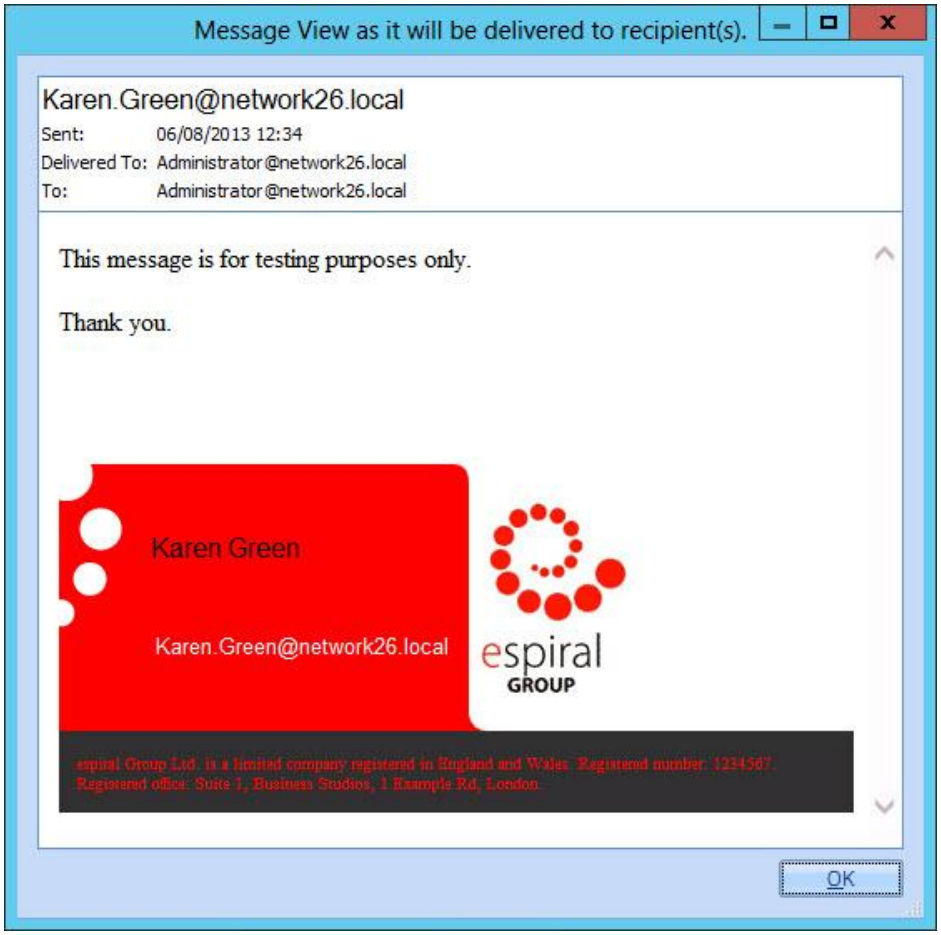
To view a brief summary of why a signature was or was not applied to the test message, hover the cursor over the relevant section of the process diagram until additional icons are displayed (as shown in the example above). Then, click to view summary information - for example:



More detailed information is available at the bottom of the rules applied tab, as described in the previous section.

Previewing the Message at Any Stage in the Process

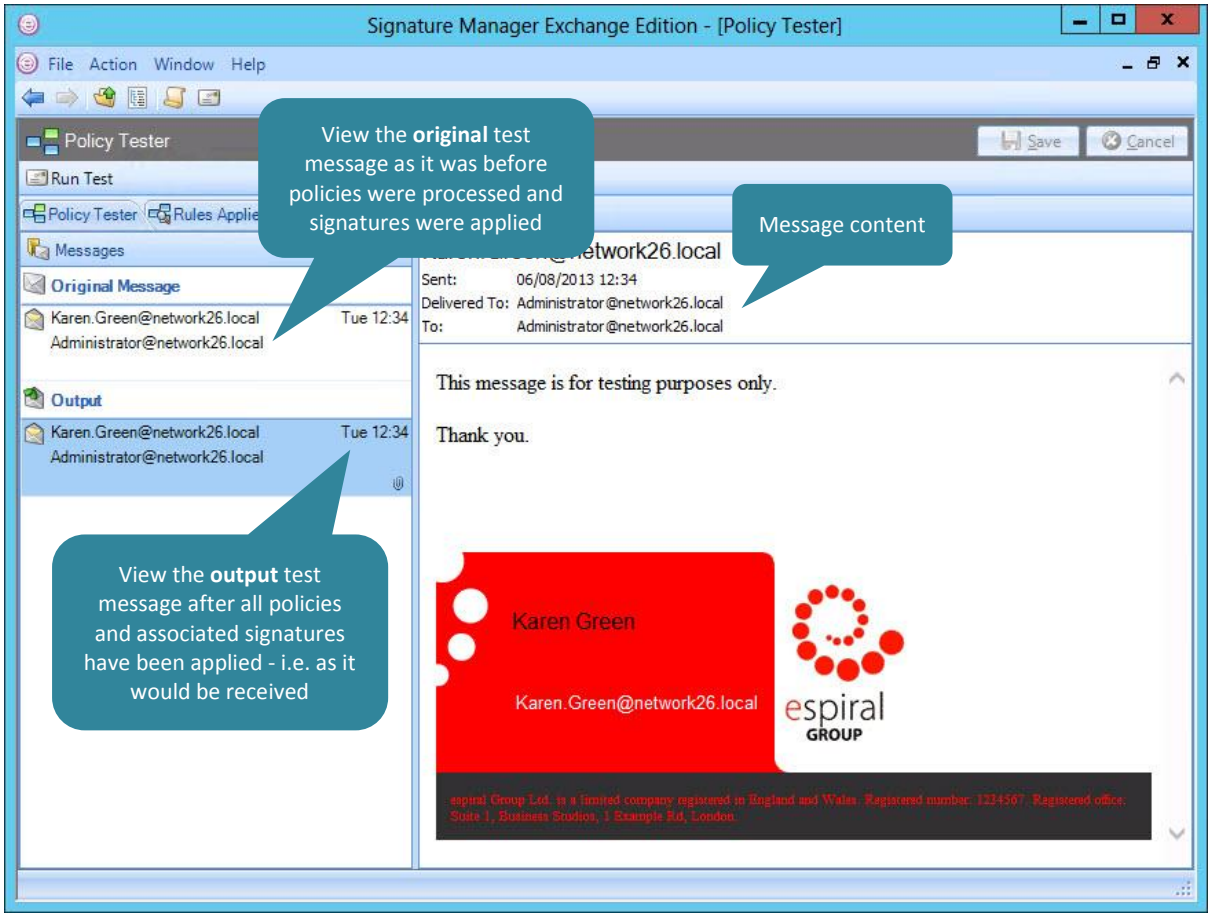
To view a preview of the test email message at a particular stage of processing, hover the cursor over the relevant section of the process diagram until additional icons are displayed. Then, click to view the message at this point:


Message View as it will be delivered to recipient(s).
Karen.Green@network26.local
Sent: 06/08/2013 12:34
Delivered To: Administrator@network26.local
To: Administrator@network26.local
This message is for testing purposes only.
Thank you.
Karen Green
Karen.Green@network26.local
espiral
GROUP
espiral Group Ltd. is a limited company registered in England and Wales. Registered number: 1234567.
Registered office: Suite 1, Business Studios, 1 Example Rd, London.
OK

If you click the final message node in the rules applied diagram and choose the preview option, you will see what (if any) signature is applied once all processing is complete. Alternatively, you can click the messages tab [pg.174] and check the output entry for this test.

Working with Test Messages

Having run a policy test, an additional tab named messages is displayed. From here, you can view the original test message and also the final output:



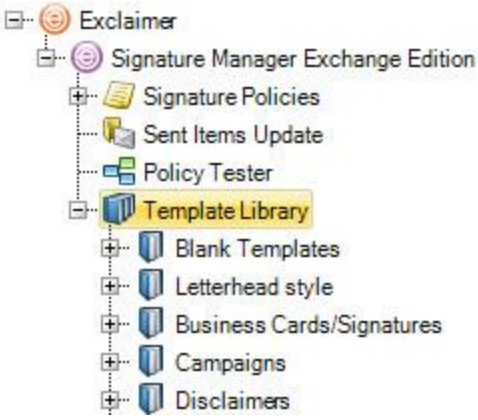
Chapter 8

The Template Library

The Template Library

Templates can be used to create rich, sophisticated HTML layouts (including tables, images and dynamic Active Directory fields), together with simpler RTF versions and then basic Plain Text signatures. Templates can be placed [pg.207] before, after or between original email messages, which means they can be used to consistently apply contact details, legal disclaimers, corporate branding, banners for sales promotions and corporate events...the possibilities are immense.

Within Exclaimer Signature Manager Exchange Edition, all work with templates is completed using the template library (within the Exclaimer console [pg.31] tree):



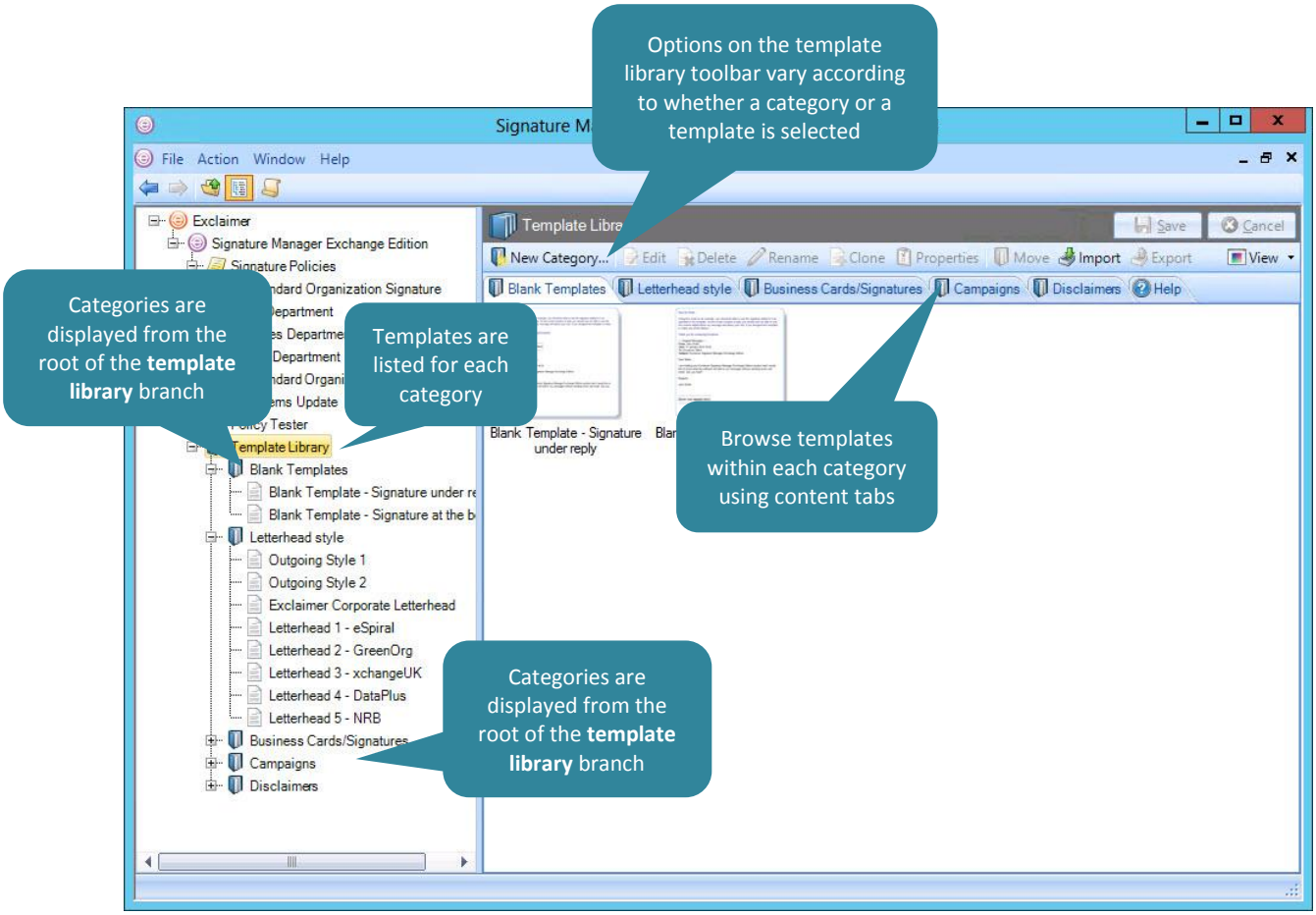
The template library is organized using categories, so that templates of the same type are grouped. When the topmost branch (template library) is selected, you can browse templates and work at category level. Below this, you can select specific categories to browse, edit and add templates. This section explains how the template library is used, including:

- Understanding the template library window [pg.177]
- Working with categories [pg.179]
- The template editor [pg.190]
- Adding a new template [pg.185]
- Cloning a template [pg.188]
- Exporting a template [pg.190]
- Importing a template [pg.192]
- Editing a template [pg.193]
- Renaming a template [pg.194]
- Moving a template [pg.195]
- Removing a template [pg.194]

You can also learn more about specific tasks, using the how to [pg.315] section for templates.

Understanding the Template Library Window

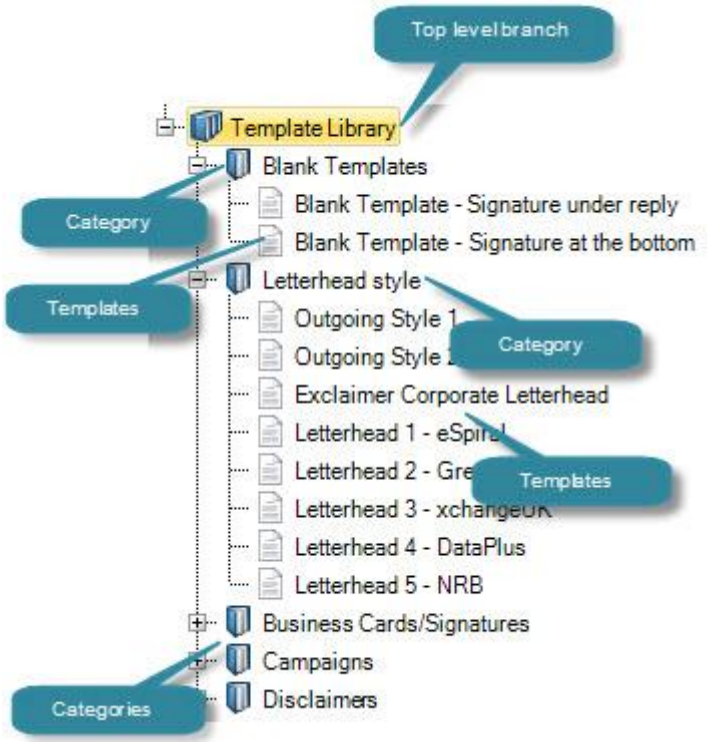
When the template library branch is selected in the console tree, you can browse templates and work at category level:



Options shown here are summarized in the following sections.

Console Tree

When the top level (template library) branch is selected in the console tree, any template categories are shown as child branches, followed by templates within those categories:



The Template Library Toolbar

The template library toolbar provides quick access to key tasks. Options on this toolbar vary, depending on which branch of the library is currently selected. Those listed below are available when the top level (template library) branch is selected:

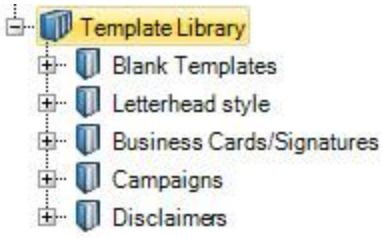
Option	Function	Notes
New Category	Create new category [pg.180]	Adds a new category to the bottom of the tree
Import	Import a template [pg.192]	Imports previously exported [pg.190] template files into the template library.

The Template Library Content Pane

When the top level (template library) branch is selected, the content pane displays available categories as a series of tabs. If a category is selected, templates within that category are shown in the content pane, and if a template is selected the content pane shows a preview of that template.

Working with Categories

Within the template library, categories are used to organise templates into logical groups. Exclaimer Signature Manager Exchange Edition includes a range of professionally designed templates within a number of default categories, as shown below:



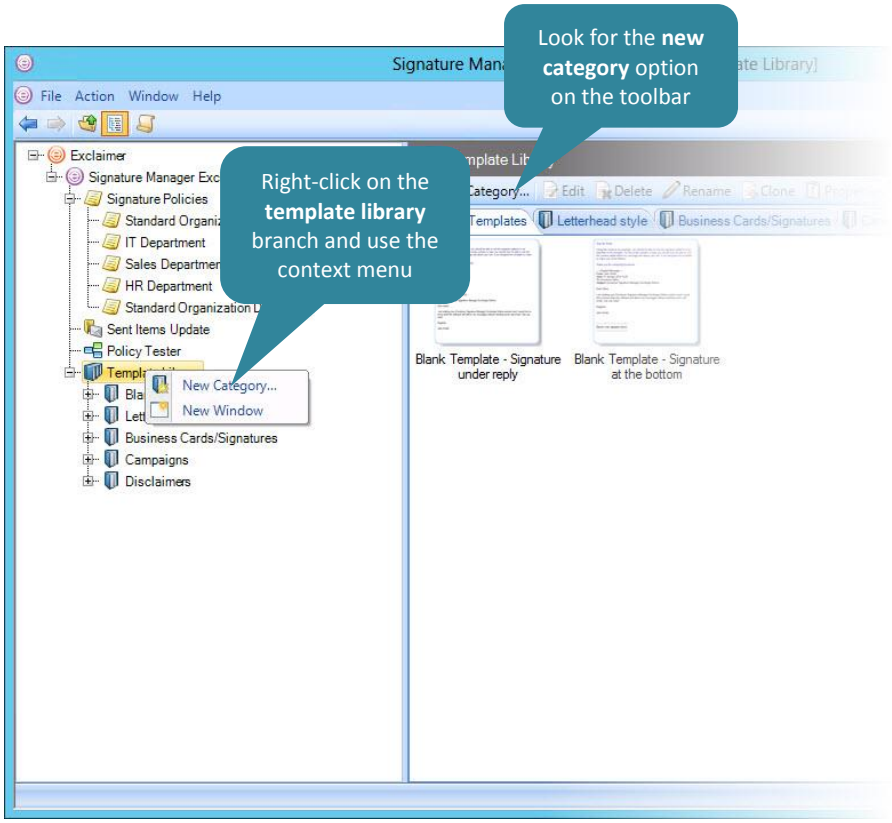
You can add, change and remove categories and templates, as required (at least one category must always be present). There is no right or wrong way to define categories - use whatever structure suits your organizational needs.

To view and browse existing categories, select the template library branch from the console tree. Existing categories can be viewed in the tree structure, or from the content pane [pg.178]. From here you can:

- Add a new category [pg.180]
- Rename a category [pg.181]
- Remove category [pg.182]

Adding a New Category

The new category option is available from different areas of the template library - it can be accessed from the console tree, from the library toolbar and from the actions pane:



Having selected the new category option, you are prompted to enter a category name:

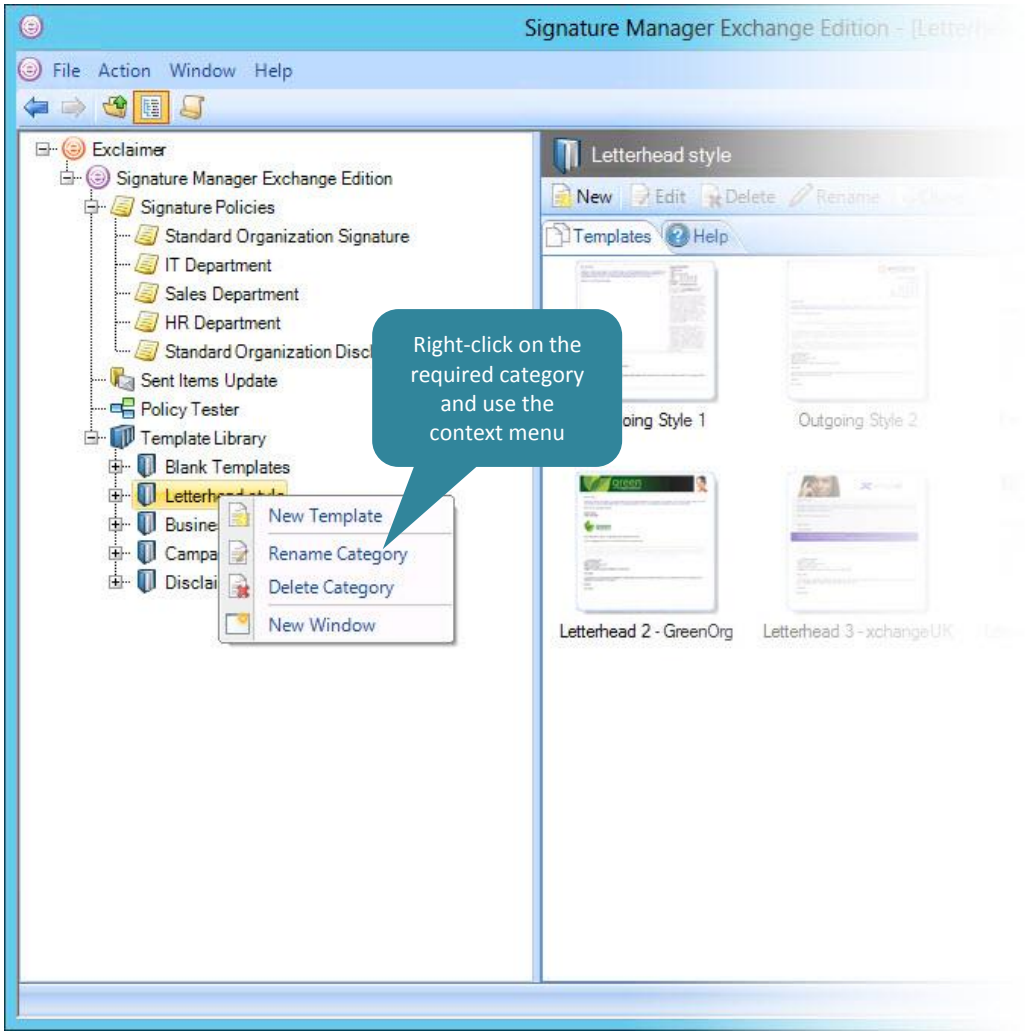
Simply enter the required name and click OK. The new category is added to the end of the categories list in the console tree.

NOTE

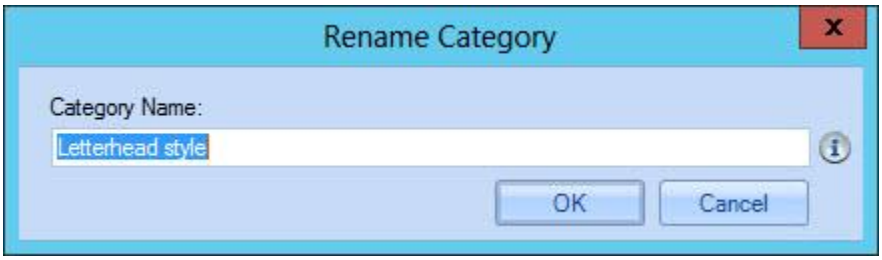
When you are satisfied that all changes have been made correctly, click the main **save** button to save changes [pg.44] made in this session. Alternatively, use the **cancel** button to abandon all changes.

Renaming a Category

The rename category option is available from the console tree and from the actions pane:



Having selected the rename category option, you are prompted to enter a category name:



Simply enter the required name and click OK.

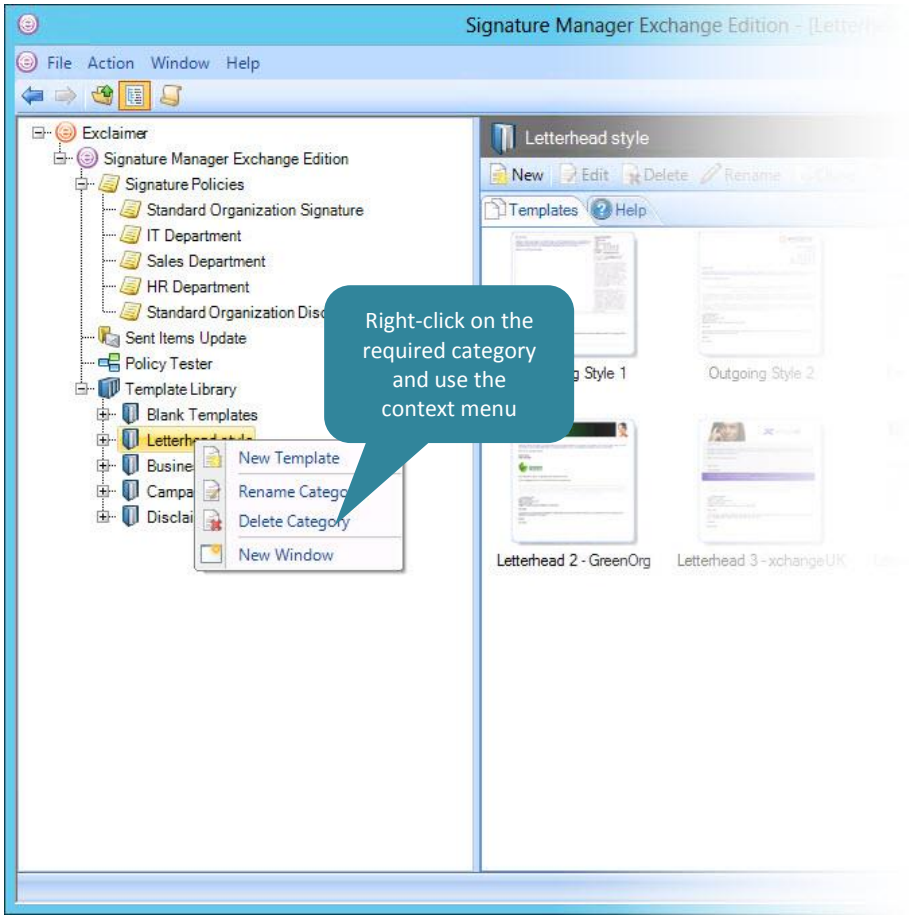
NOTE

When you are satisfied that all changes have been made correctly, click the main **save** button to save changes [pg.44] made in this session. Alternatively, use the **cancel** button to abandon all changes.

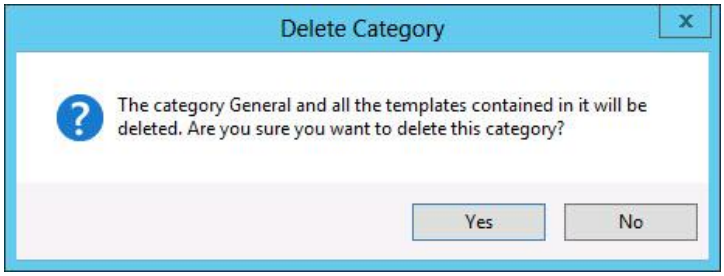
Removing a Category

It is important to note that removing a category will also remove any templates within that category. If required, you can move existing templates [pg.195] to alternative locations within the template library, or you may wish to rename [pg.181] the category rather than remove it.

The delete category option is available from the console tree and from the actions pane:



Having selected the delete category option, you are prompted to confirm that you wish to proceed:


Delete Category
The category General and all the templates contained in it will be deleted. Are you sure you want to delete this category?
Yes
No

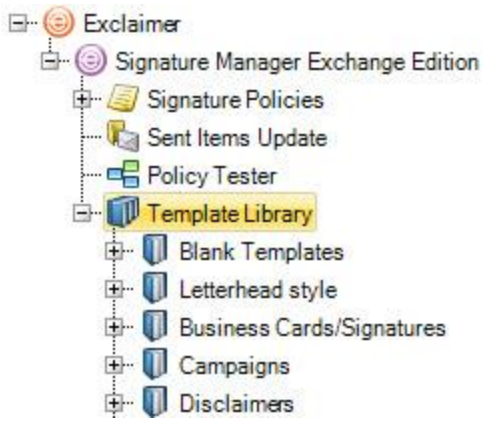
Click yes to remove the selected category.

NOTE

A category is not permanently deleted until settings have been saved. If you exit without saving (or cancel changes), the category will be reinstated in the console tree.

Working with Templates

All work with templates is completed within the template library [pg.177]. The appearance of the library will vary, depending on how you have chosen to organize templates into categories [pg.179]. For example:

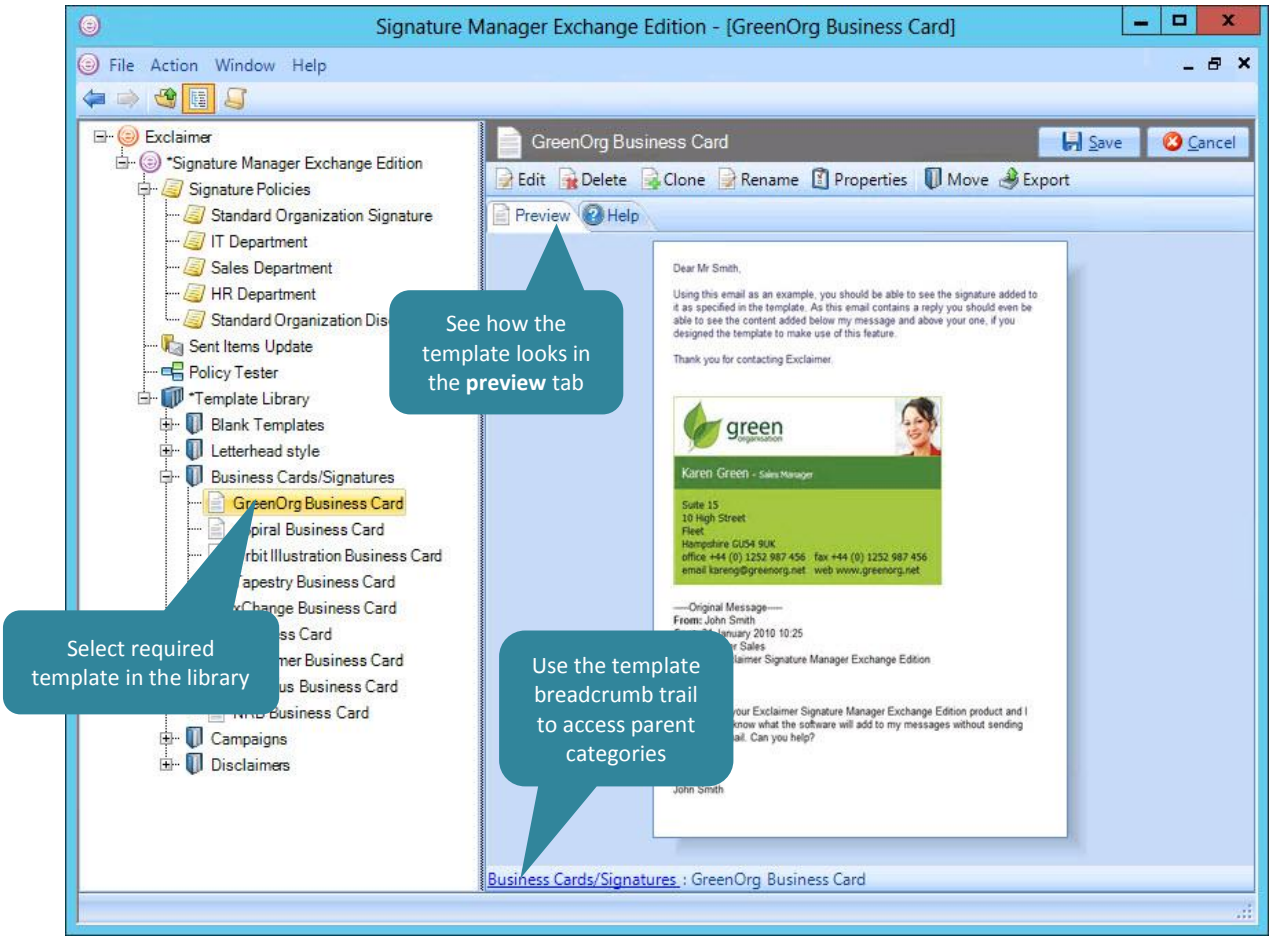


Having selected a template, you can preview and edit content in different formats (HTML, RTF and Plain Text) using an intuitive template editor, and of course you can add new templates to the library. This section explains how to work with templates, including:

- The template editor [pg.190]
- Adding a new template [pg.185]
- Cloning a template [pg.188]
- Exporting a template [pg.190]
- Importing a template [pg.192]
- Editing a template [pg.193]
- Renaming a template [pg.194]
- Moving a template [pg.195]
- Removing a template [pg.194]

Previewing a Template

To quickly see how a particular template will look when it is applied to email messages, simply select the required template from the console tree. The template is applied to a test message and displayed in the preview tab (within the content pane):



From here you can:

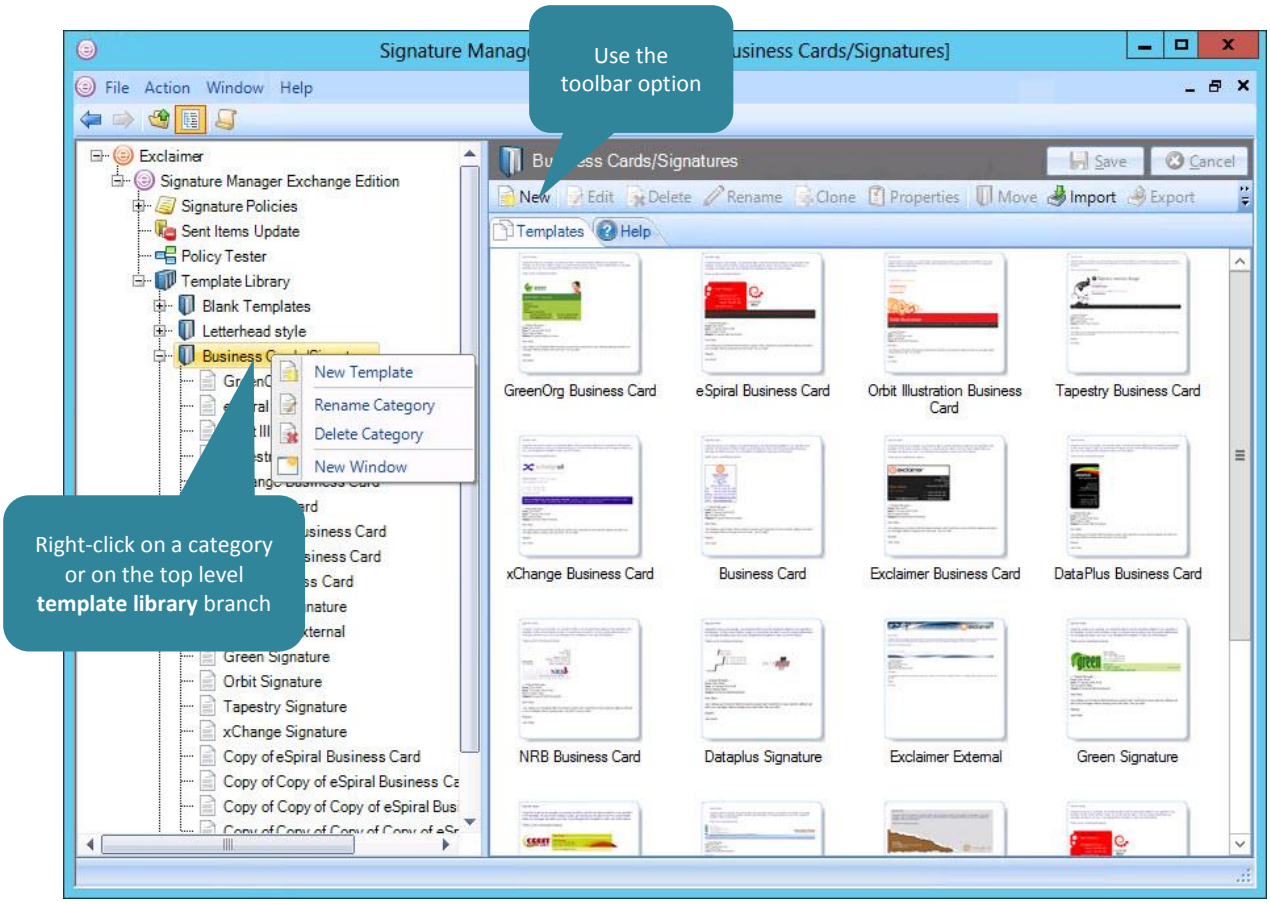
- Double click anywhere in the preview tab to edit the template [pg.193] in the template editor [pg.190]
- Select a template category [pg.179] from the template breadcrumb trail to view other templates in that category
- Use toolbar options to edit [pg.193], delete [pg.197], clone [pg.188], rename [pg.194] or move [pg.195] the template, or view associated properties [pg.196]

NOTE

This **preview** option always shows the **HTML** version of the template. If you wish to preview **RTF** or **Plain Text** versions, you should choose to edit the template [pg.193] and select the **preview** mode for the required format.

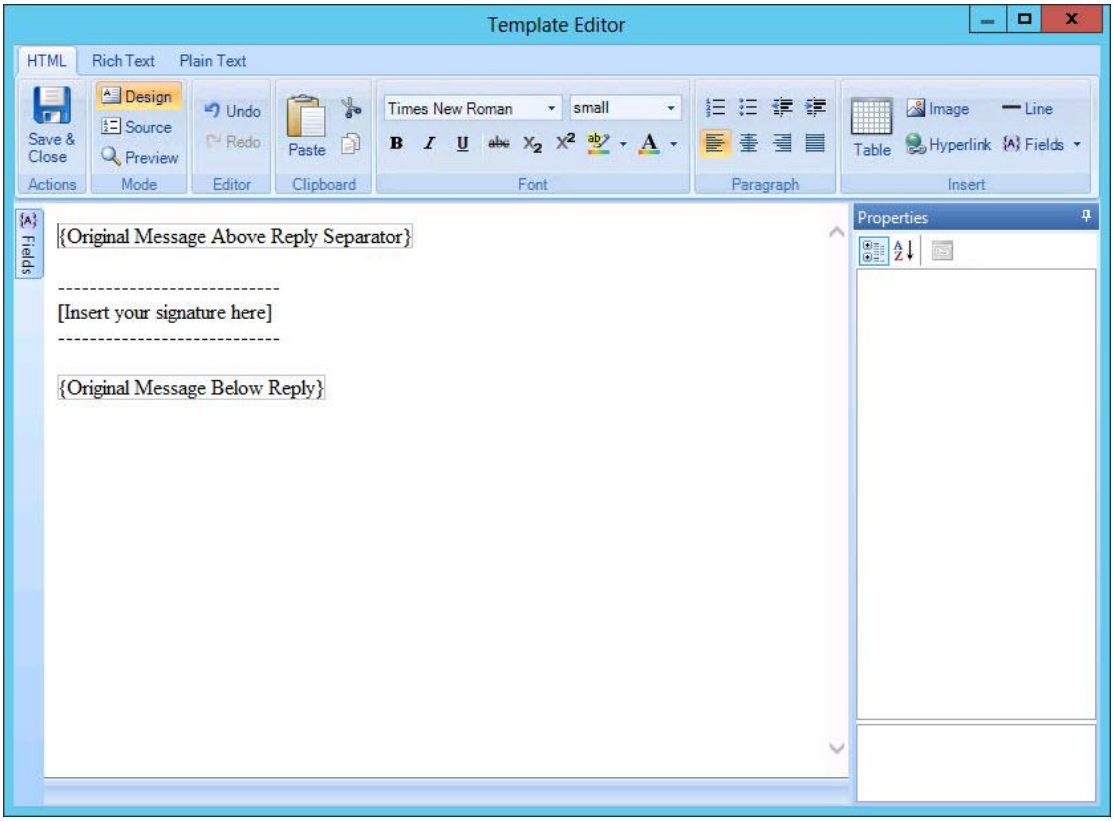
Adding a New Template

The new template option is available from different areas of the template library - it can be accessed from the console tree, from the library toolbar and from the actions pane:



To add a new template, follow the steps below:

1. Select the new template option to open a blank template in the template editor [pg.190]:



2. At this stage, the new template is added to the template library with a temporary name. This name varies, depending on where the new template option was selected. If you added the template from a category, the template name will reflect the category name. If you started from the top level template library branch of the tree, the template is automatically assigned to the first category and is assigned a name to reflect that category.

3. Position and format the original message fields [pg.207] so that the signature is inserted in the required position, and original message content is formatted as required.

> NOTE
>
> The way in which **original message** fields are formatted controls the formatting of the original message. For example, the font type, color, size, etc. applied to the fields will be reflected in email messages. So (for instance) if you want original messages to be formatted in Arial font, you would select these fields and apply the Arial font.

4. Create your template with required text and formatting; taking care to place the original message fields [pg.207] correctly so that the signature is inserted in the required position.

> NOTE
>
> Remember that you can use tables, images, dynamic fields and properties when creating templates. Please refer to the template editor [pg.190] section of this guide for detailed information about editor options.

5. Switch between HTML, RTF and Plain Text tabs to create the template in each format.

6. Click save and close (from the editor toolbar) to return to the template library. If you have not updated all format tabs (HTML, RTF and Plain Text), warnings are displayed. You must enter content for all formats before you can save the template.

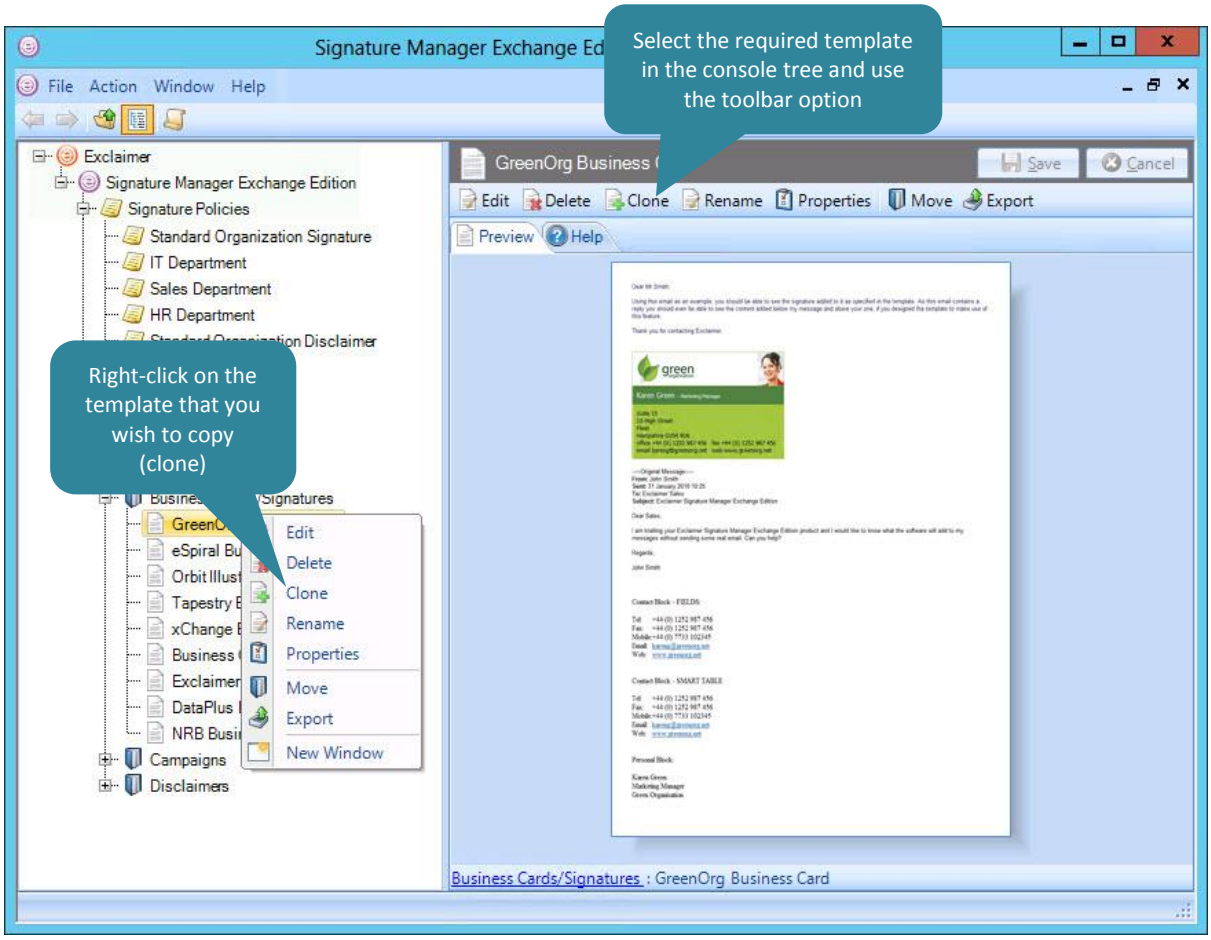
7. If required, rename [pg.194] the new template.

8. If required, move [pg.195] the template to a different category [pg.179].

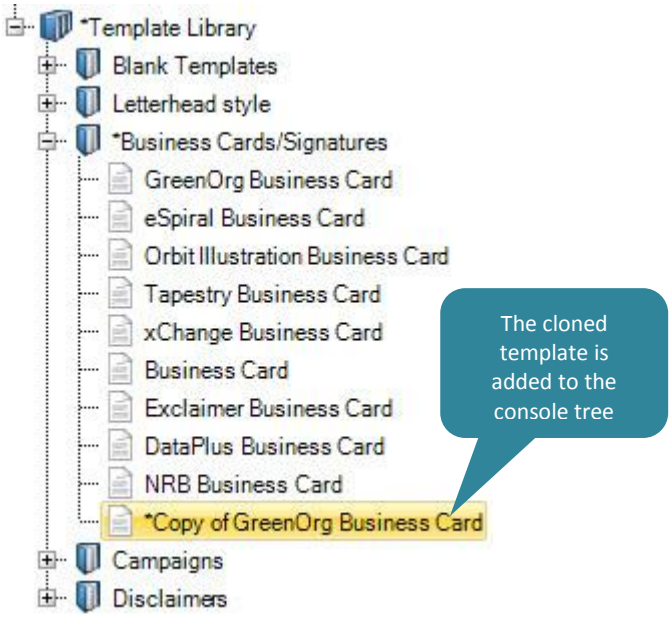
9. Click the main save button to save changes [pg.44] made in this session. Alternatively, use the cancel button to abandon all changes.

Cloning a Template

If you need to create a new template which has similar settings to an existing template, it is quicker to take a copy of the existing template and then update that copy (as opposed to creating a new template from first principles [pg.185]). The clone option is used to create a copy of an existing template for this purpose, and is available from the template library toolbar or the right-click menu:



To clone an existing template, select the template to be copied from the console tree, then either click clone from the toolbar or right-click and select clone from the context menu. A copy of the selected template is added to the console tree, ready to be updated:

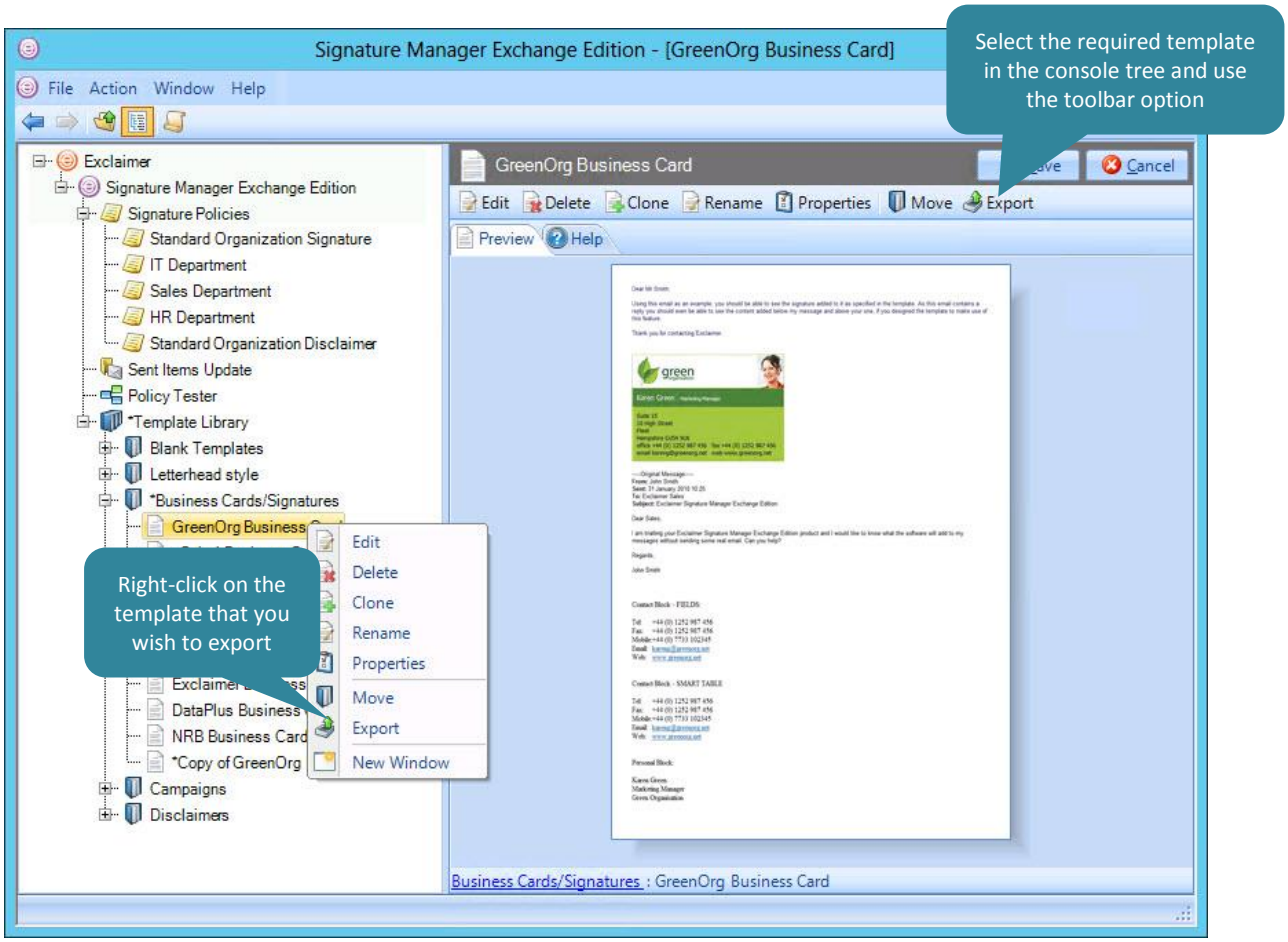


From here you can change the name [pg.194] and edit template content [pg.193]t as required. Having updated the cloned template, click the main save button to save changes [pg.44] made in this session. Alternatively, use the cancel button to abandon all changes.

Exporting a Template

If required, you can export a template to a file. This is useful (for example) if you have chosen not to implement remote deployment [pg.40] and need to import a template [pg.192] on another server, or if you wish to delete a template but wish to take a copy first, just in case the template is needed in future.

The export option is available from the template library toolbar or the right-click menu:



NOTE

The **export template** option is also available if you right-click anywhere within the template tab for a particular signature policy [pg.79].

To export a template:

1. Select the export option for the required template to open the save as window.

> NOTE
>
> The **file name** defaults to the name of the selected template and the **file type** is a **zip**. A **zip** file is used because there are multiple parts to a template file - it is not a single document. The contents of the **zip** file are in a proprietary format; only templates exported from Exclaimer Signature Manager Exchange Edition can be imported [pg.192].

2. Navigate drives and folders to select the required location for the template file.
3. Click save to complete the export.

Importing a Template

Previously exported [pg.190] templates can be imported into the template library. To do this, follow the steps below:

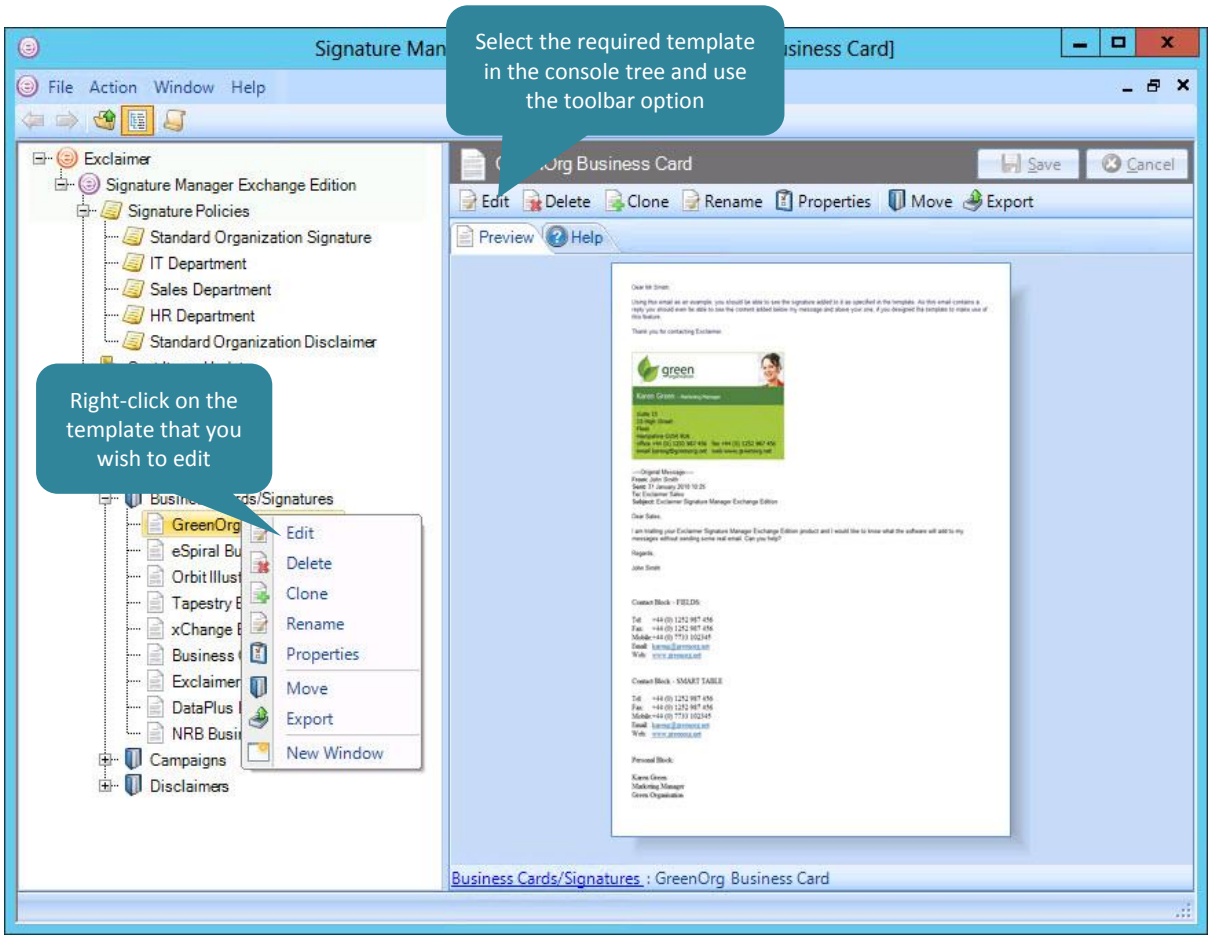
1. In the console tree, select a parent category for the template. Notice that import and export options are now activated on the toolbar.
2. Select import to display the open window.

> NOTE
>
> When a template is exported, the exported file format is **.zip**. Notice that the default file type here is set to **.zip**.

3. Navigate drives and folders to select the required import file.
4. Click open to complete the import and add the template to the template library.

Editing a Template

The edit option is available from different areas of the template library - it can be accessed from the console tree, from the template library toolbar, or by double clicking anywhere in the template preview pane:



NOTE

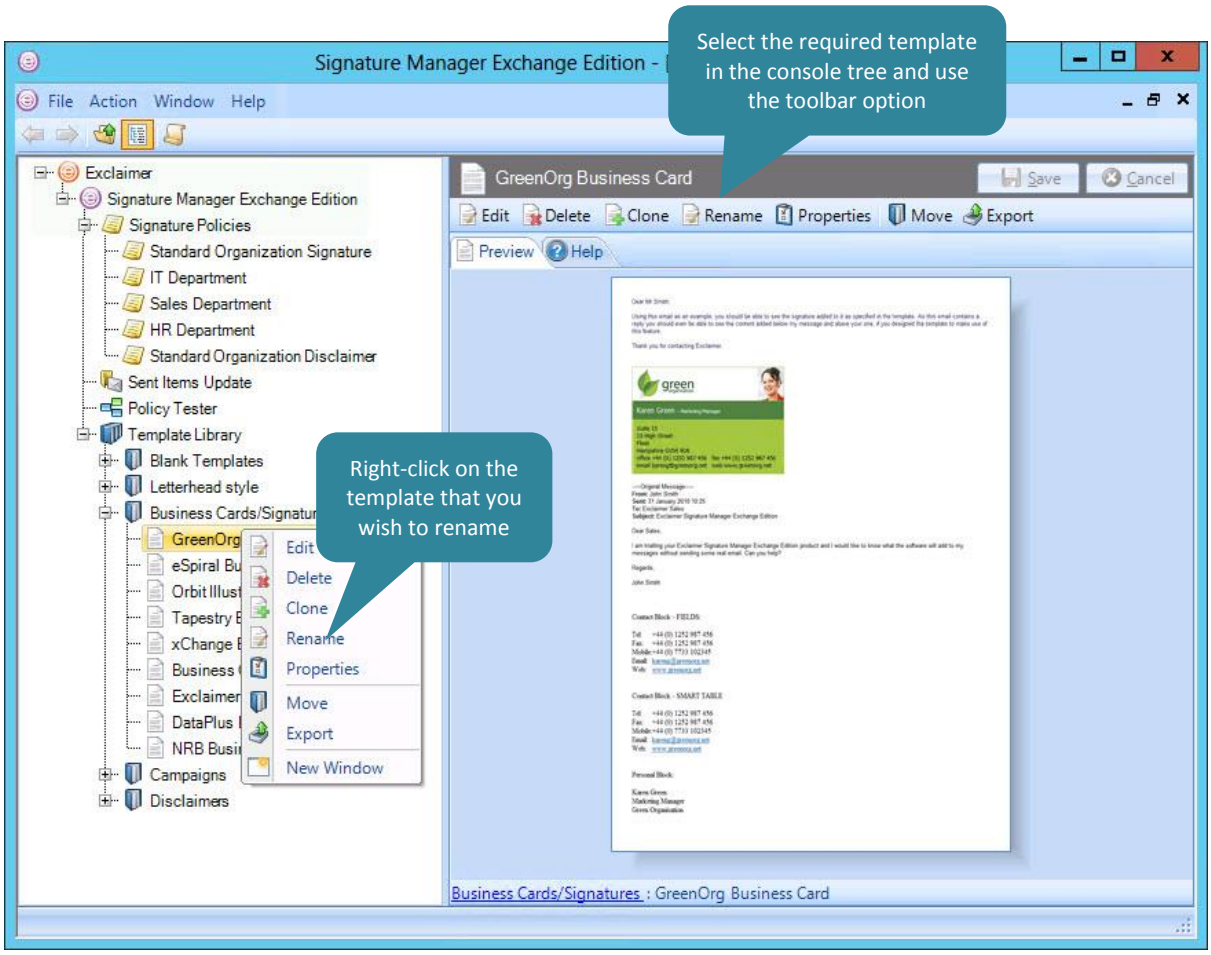
The **edit template** option is also available if you right-click anywhere within the template tab for a particular signature policy [pg.79].

Having selected the edit option, the template is opened in the template editor [pg.190]. Simply make required changes, then click save and close (from the editor toolbar) to return to the template library.

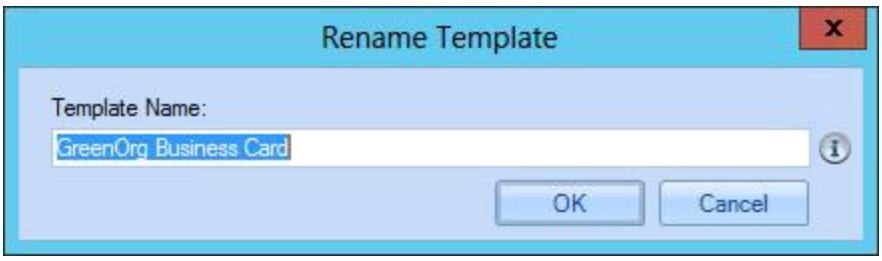
When you are satisfied with changes to the template, click the main save button to save changes made in this session. Alternatively, use the cancel button to abandon all changes.

Renaming a Template

The rename option is available from different areas of the template library - it can be accessed from the console tree or from the template library toolbar:



Having selected the rename option, you are prompted to enter a template name:



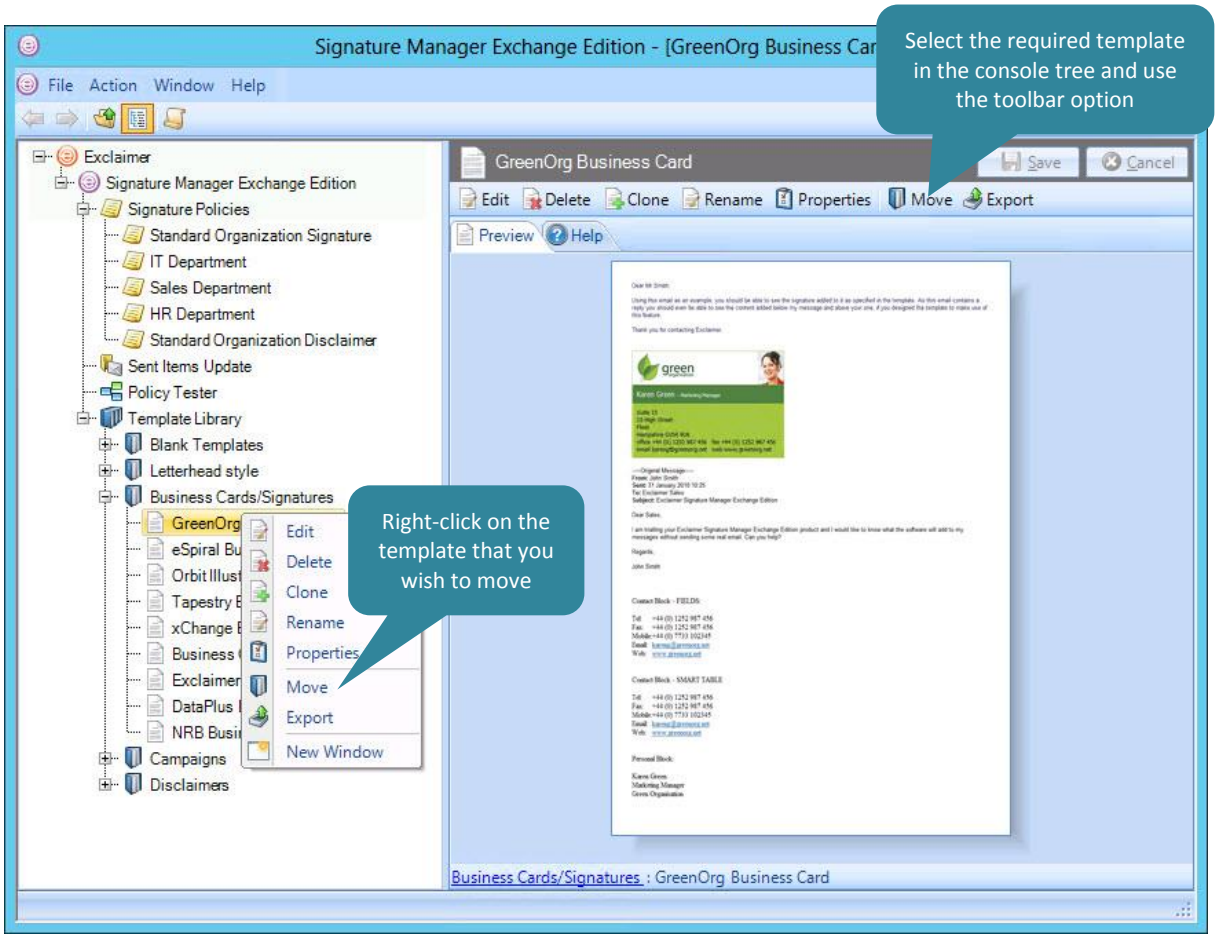
Simply enter the required name and click OK.

NOTE

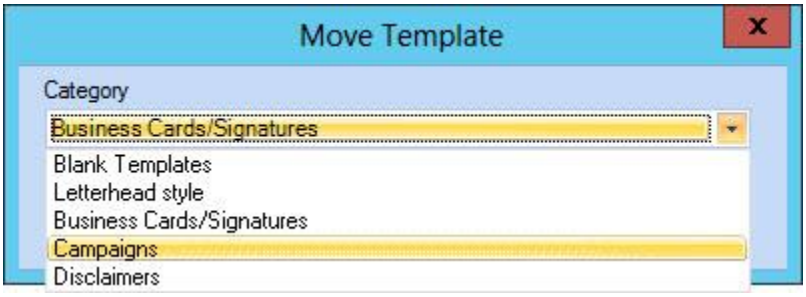
When you are satisfied that with your changes, click the **save** button to save changes [pg.44] made in this session. Alternatively, use the **cancel** button to abandon all changes.

Moving a Template

Templates can be moved from one category to another using the move option, available from the template library toolbar or the right-click menu:



Having selected the move option, a list of available categories is displayed:



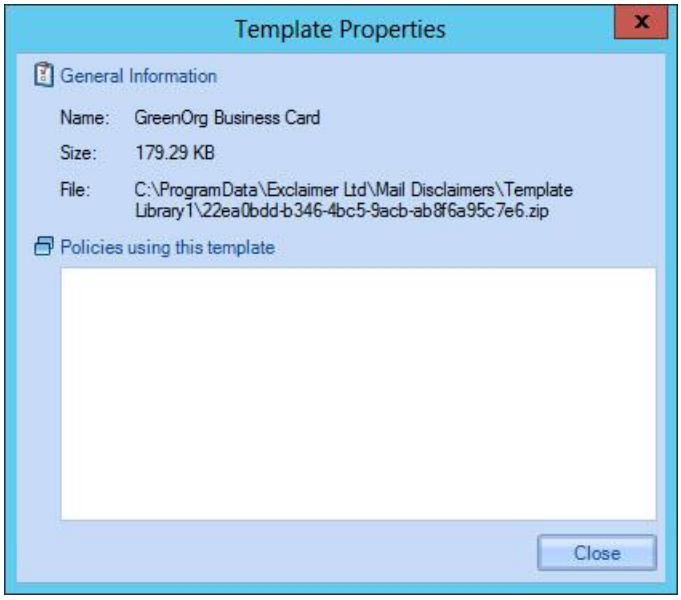
Select the required category and click OK to complete the operation.

NOTE

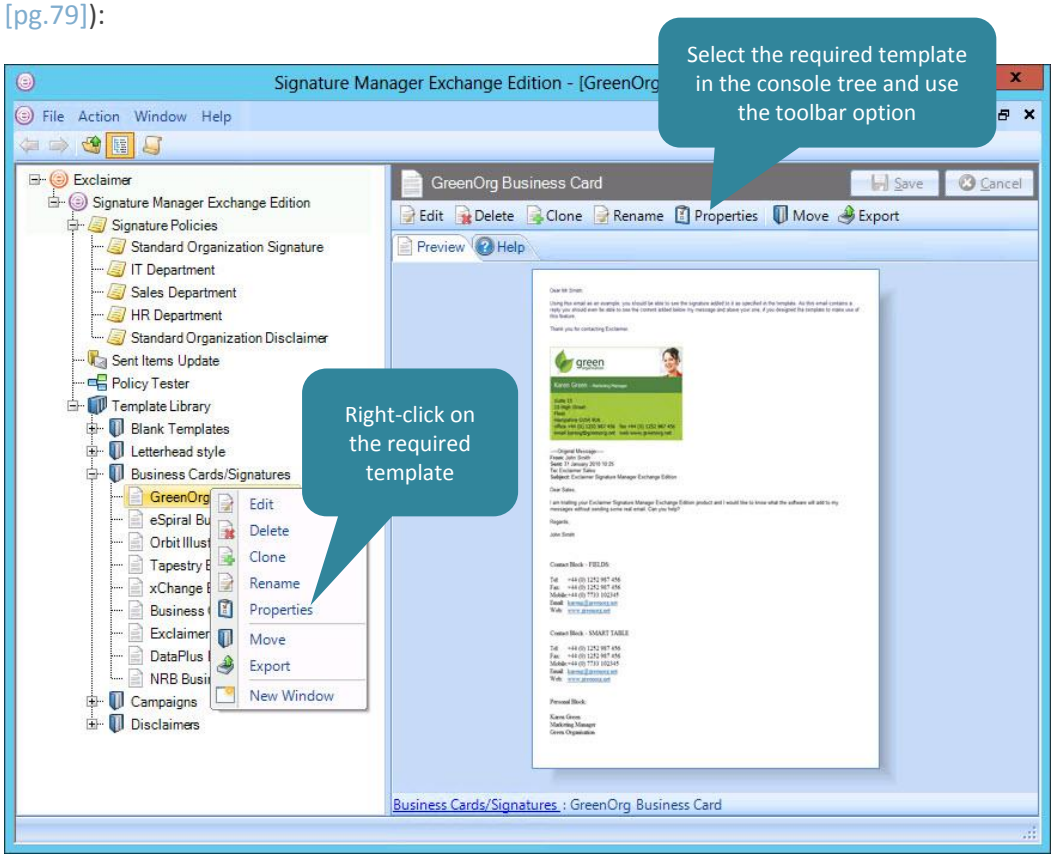
When you are satisfied that with your changes, click the **save** button to save changes [pg.44] made in this session. Alternatively, use the **cancel** button to abandon all changes.

Viewing Template Properties

The template properties window shows general information about the template. From here you can see the template name, size and file location together with a list of policies that are using the template:

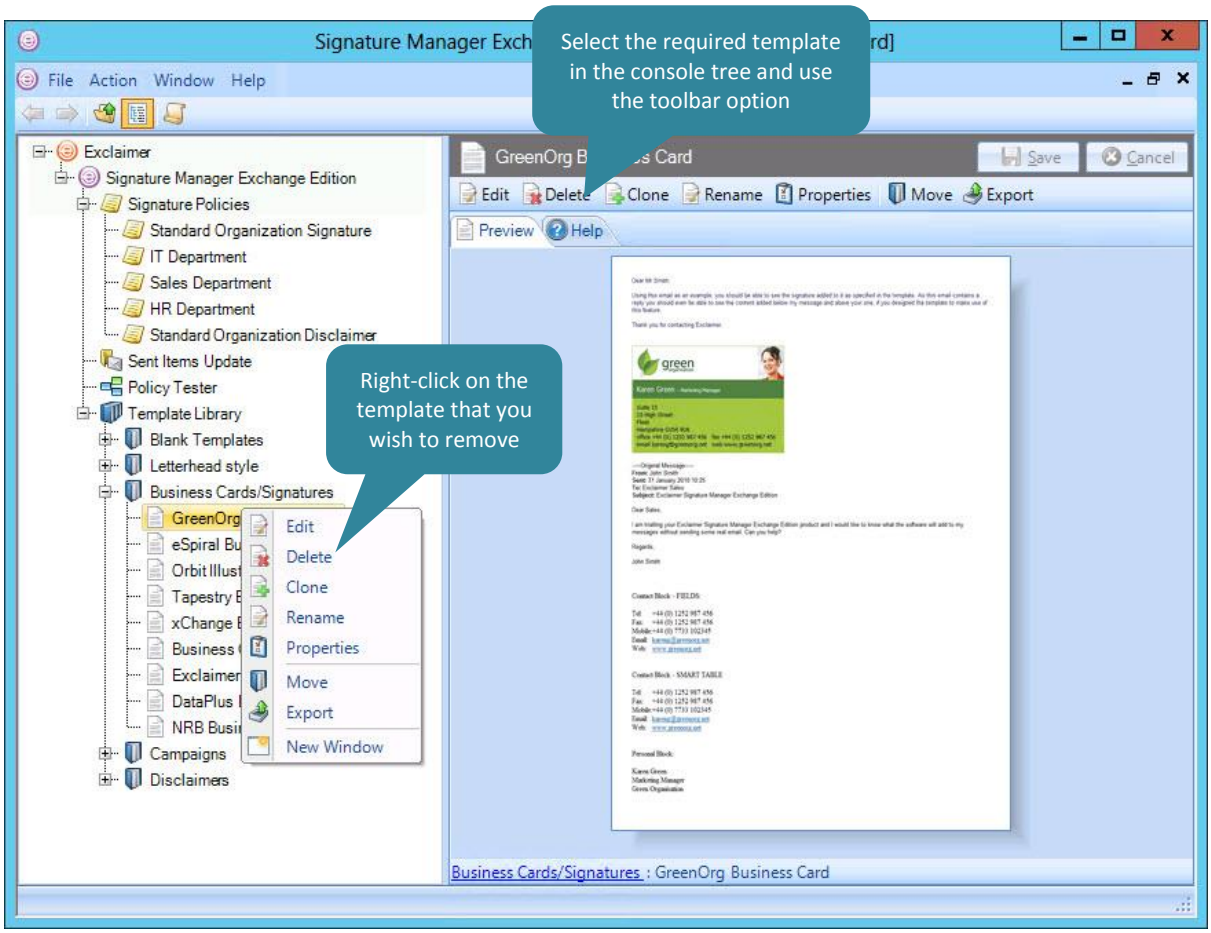


The properties option is available from the template library toolbar and from the right-click menu (it is also available if you right-click anywhere within the template tab for a particular signature policy [pg.79]):

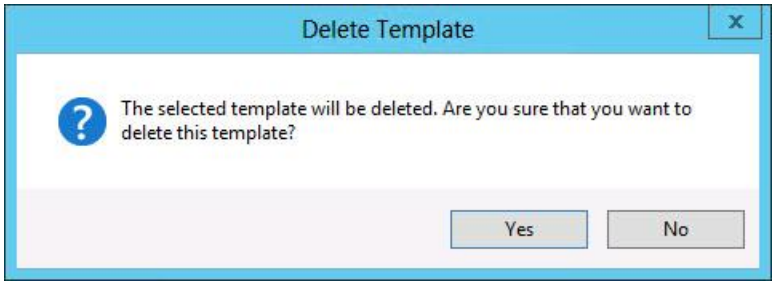


Removing a Template

Templates can be removed using the delete option, available from the template library toolbar or the right-click menu:



Having selected the delete option, you are prompted to confirm that you wish to proceed:



Click yes to remove the selected template.

NOTE

A template is not permanently deleted until settings have been saved. If you exit without saving (or **cancel** changes), the category will be reinstated in the console tree.

Chapter 9

The Template Editor

Introduction

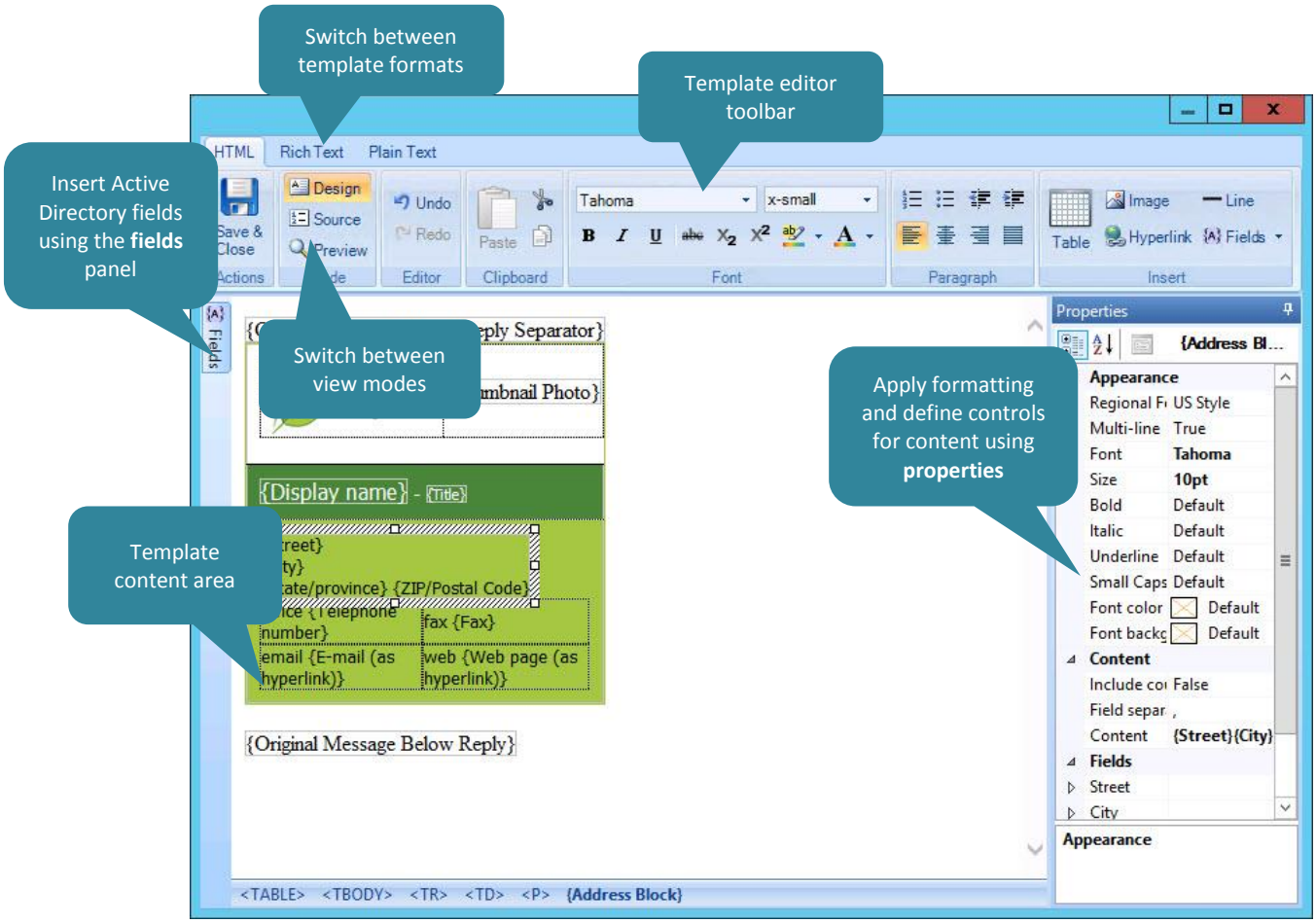
The template editor is used to add, edit and preview templates in HTML, RTF and Plain Text formats. With a look and feel that will be familiar to Microsoft Outlook users, you can create templates which are as basic or as sophisticated as required.

This section provides an introduction to the template editor, including:

- Understanding the template editor window [pg.200]
- Template editor - toolbar variations [pg.203]
- Placement of signature content [pg.207]
- Fields [pg.215]
- Properties [pg.309]

Understanding the Template Editor Window

The template editor is used to add, edit and preview templates in HTML, RTF and Plain Text formats:



The editor has a familiar, intuitive design, as summarized in the following sections.

The Content Area

All content is added to the main content area of the template editor. When you choose to add a new template, the editor is opened with original text placeholders, which are used to determine where your signature content should be placed in relation to message content [pg.207].

It is also important to note that the way in which these fields are formatted controls the formatting of the original message. For example, the font type, color, size, etc. applied to the fields will be reflected in email messages. So (for example) if you want original messages to be formatted in Arial font, you would select these fields and apply the Arial font. You can add text, or insert additional content using toolbar options.

Switching Between Different Views

Toolbar options are available for switching between design, source and preview modes, where:

- The design option shows the template design in WYSIWYG (What You See Is What You Get) mode, so you can edit content in situ.
- The source option displays HTML source code for the template.
- The preview option shows how the template will be displayed using a sample email message. If required, you can choose a specific user to see how the template would be displayed using details for that sender.

Switching Between Different Format Types

Tabs at the top of the editor are used to switch between different formats for a template (HTML, RTF and Plain Text). When a new template is added, all three formats must be updated.

The Template Editor Toolbar

If you are used to working with Microsoft Outlook, the template editor toolbar will be very familiar. When switching between format tabs, toolbar options will change, since some options are only applicable to a given format (for example, you can insert tables into HTML templates, but not in RTF or Plain Text versions). For a summary of the different toolbar options, see template editor - toolbar variations [pg.203].

The Fields Panel

The fields option is used to insert dynamic content from the Active Directory. Click on the fields option to activate the fields panel - a list of available fields that can be inserted into the template. Once a field has been inserted, this panel is automatically hidden so that the template editor is not cluttered.

Fields can be used in all template formats (HTML, RTF and Plain Text). For further information, see the fields [pg.215] section of this guide.

The Properties Pane

Properties are used to format and control template content. Almost every piece of content added to a template will have properties associated with it - for example, text, tables, images, fields, hyperlinks, etc. The properties pane changes to reflect the current selection in the template editor - see the properties [pg.309] section of this guide for further information.

Template Editor - Toolbar Variations

When working with the template editor, templates are created in three formats - HTML, RTF and Plain Text. You must define all three formats for each template; this ensures that all scenarios are catered for.

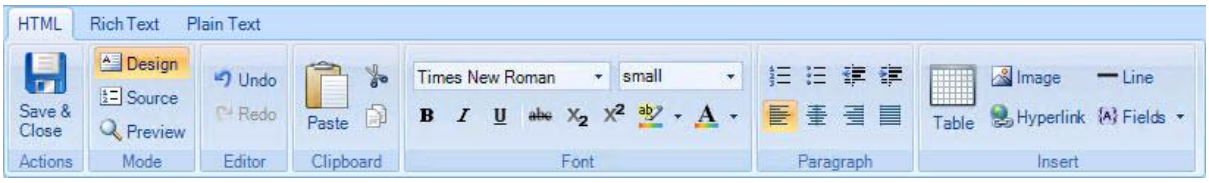
With Exclaimer Signature Manager Exchange Edition, creating different versions of a template is made simple, using the HTML, RTF and Plain Text tabs at the top of the template editor. When a tab is selected, toolbar options are updated to show options that are relevant for that format.

This section summarizes toolbar options for each format:

- The HTML editor toolbar [pg.204]
- The RTF editor toolbar [pg.205]
- The Plain Text editor toolbar [pg.206]

The HTML Editor Toolbar

HTML templates can be sophisticated and feature-rich, utilizing many of the options and techniques that you would expect from web pages (including tables, images, hyperlinks and dynamic content fields):



These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	Mode options are used to switch between different view modes. Choose from: • design - view and work with the WYSIWYG editor • source - view and work with the HTML source • preview - preview the template applied to a test message
Editor	Editor options are used to perform key editorial tasks. Choose from: • undo - undo the last action in the editor • redo - redo the last action in the editor
Clipboard	Clipboard options are used to manipulate text. Choose from: • copy - copy currently selected text to the Windows clipboard • cut - remove currently selected text and copy it to the Windows clipboard • paste - paste previously copied text at the current cursor position
Font	Font options are used to apply formatting to text. • font name - select the required font from the drop-down list • font size - select the required font size from the drop-down list Remaining options are summarized below, listed from left to right: bold, italic, underline, strike through, sub script, super script, highlight color, font color.
Paragraph	Paragraph options are used to apply paragraph formatting. Options are summarized below, listed from left to right: numbered list, bulleted list, outdent, indent, align left, center, align right, justify.
Insert	Insert options are used to apply more detailed formatting and interactive content. Options are summarized below, listed from left to right: insert table, insert image, insert horizontal line, insert hyperlink, insert fields.

The RTF Editor Toolbar

RTF templates can include standard formatting options and dynamic content fields:

These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	Mode options are used to switch between different view modes. Choose from: • design - view and work with the WYSIWYG editor • preview - preview the template applied to a test message
Editor	Editor options are used to perform key editorial tasks. Choose from: • undo - undo the last action in the editor • redo - redo the last action in the editor
Clipboard	Clipboard options are used to manipulate text. Choose from: • copy - copy currently selected text to the Windows clipboard • cut - remove currently selected text and copy it to the Windows clipboard • paste - paste previously copied text at the current cursor position
Font	Font options are used to apply formatting to text. • font name - select the required font from the drop-down list • font size - select the required font size from the drop-down list Remaining options are summarized below, listed from left to right: bold, italic, underline, strike through, sub script, super script, highlight color, font color.
Paragraph	Paragraph options are used to apply paragraph formatting. Options are summarized below, listed from left to right: numbered list, bulleted list, outdent, indent, align left, center, align right, justify.
Insert	Insert options are used to insert Active Directory fields into the template.

The Plain Text Editor Toolbar

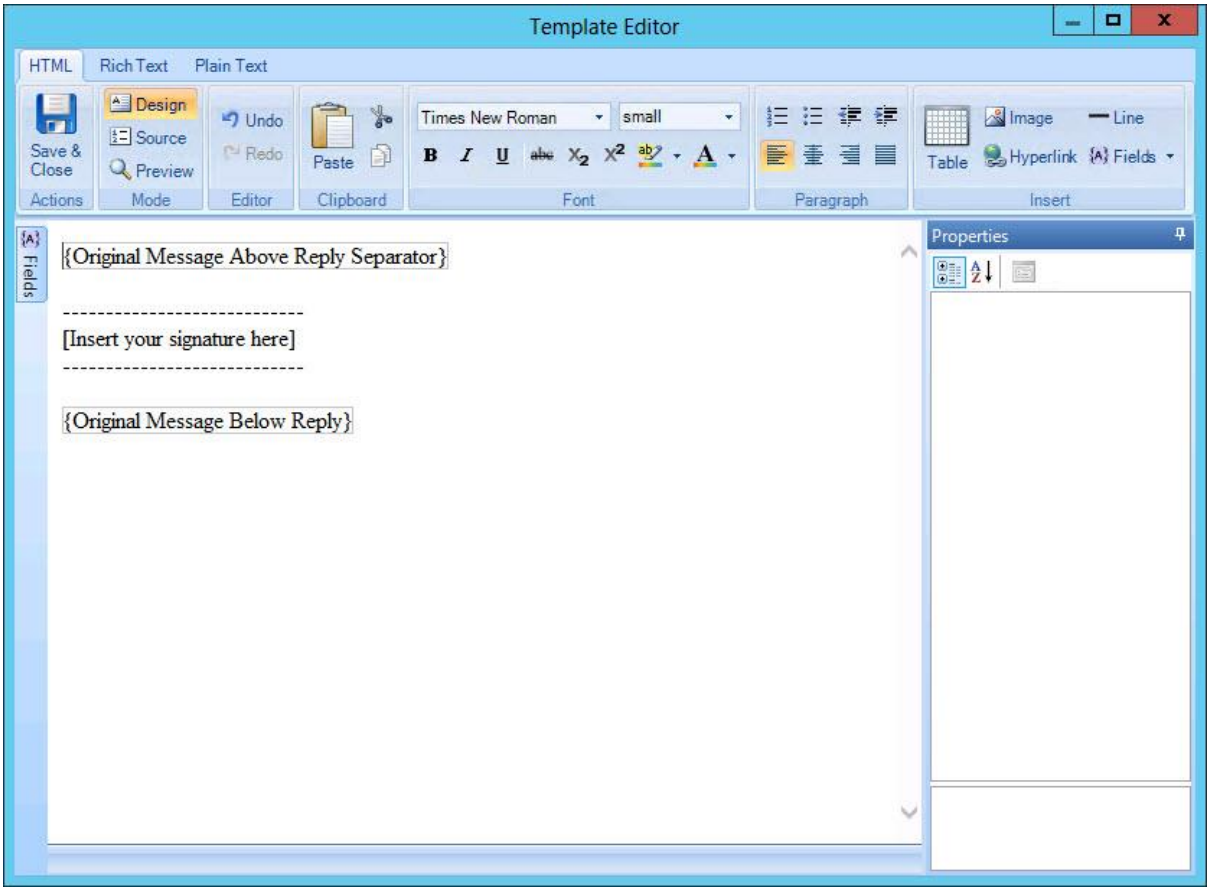
Plain text templates are composed without any formatting information, however you can still include Active Directory fields. When the template editor is set to Plain Text mode, the toolbar is shown as below:

These options are summarized below:

Toolbar Option	Summary
Actions	Save and close the current template and return to the template library.
Mode	Mode options are used to switch between different view modes. Choose from: • design - view and work with the WYSIWYG editor • preview - preview the template applied to a test message
Editor	Editor options are used to perform key editorial tasks. Choose from: • undo - undo the last action in the editor • redo - redo the last action in the editor
Clipboard	Clipboard options are used to manipulate text. Choose from: • copy - copy currently selected text to the Windows clipboard • cut - remove currently selected text and copy it to the Windows clipboard • paste - paste previously copied text at the current cursor position
View	View options are used to help when working with plain text. Select the whitespace option to view paragraph markers within the editor and click word wrap to wrap text to accommodate the window size. These options do not change the way in which the template will be viewed by recipients.
Insert	Insert options are used to insert Active Directory fields into the template.

Placement of Signature Content

When creating a new template, two fields are automatically inserted:



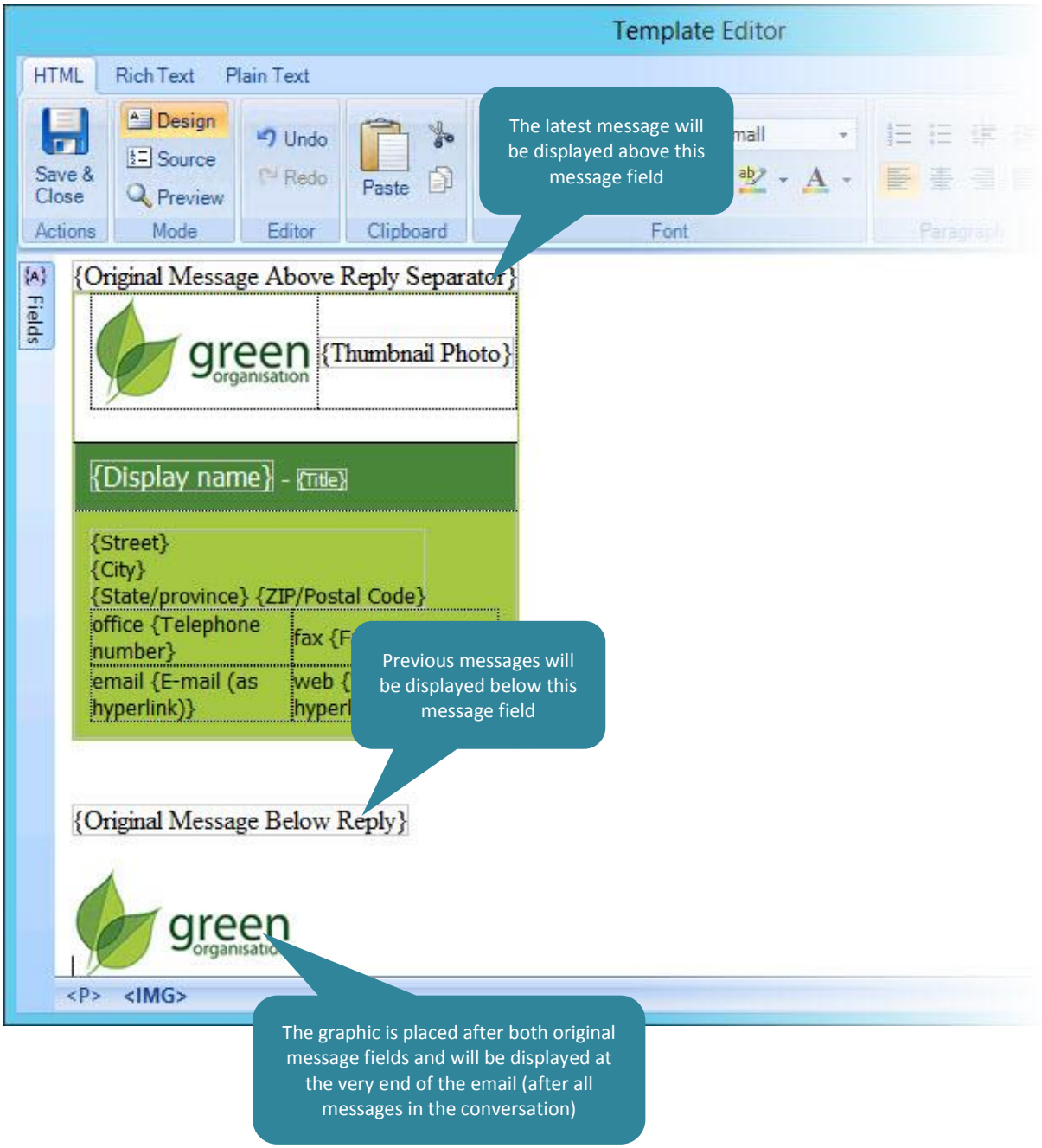
These fields can be thought of as placeholders for original email content; together they represent the structure of an email 'conversation', where:

Field	Summary
{Original Message Above Reply Separator}	The latest original message
{Original Message Below Reply Separator}	The previous message(s) in the 'conversation'

By default, placeholders are arranged so that signature content is added after the latest reply in the email thread (as shown in the example above). However, you can re-arrange the placeholders to suit your own needs.

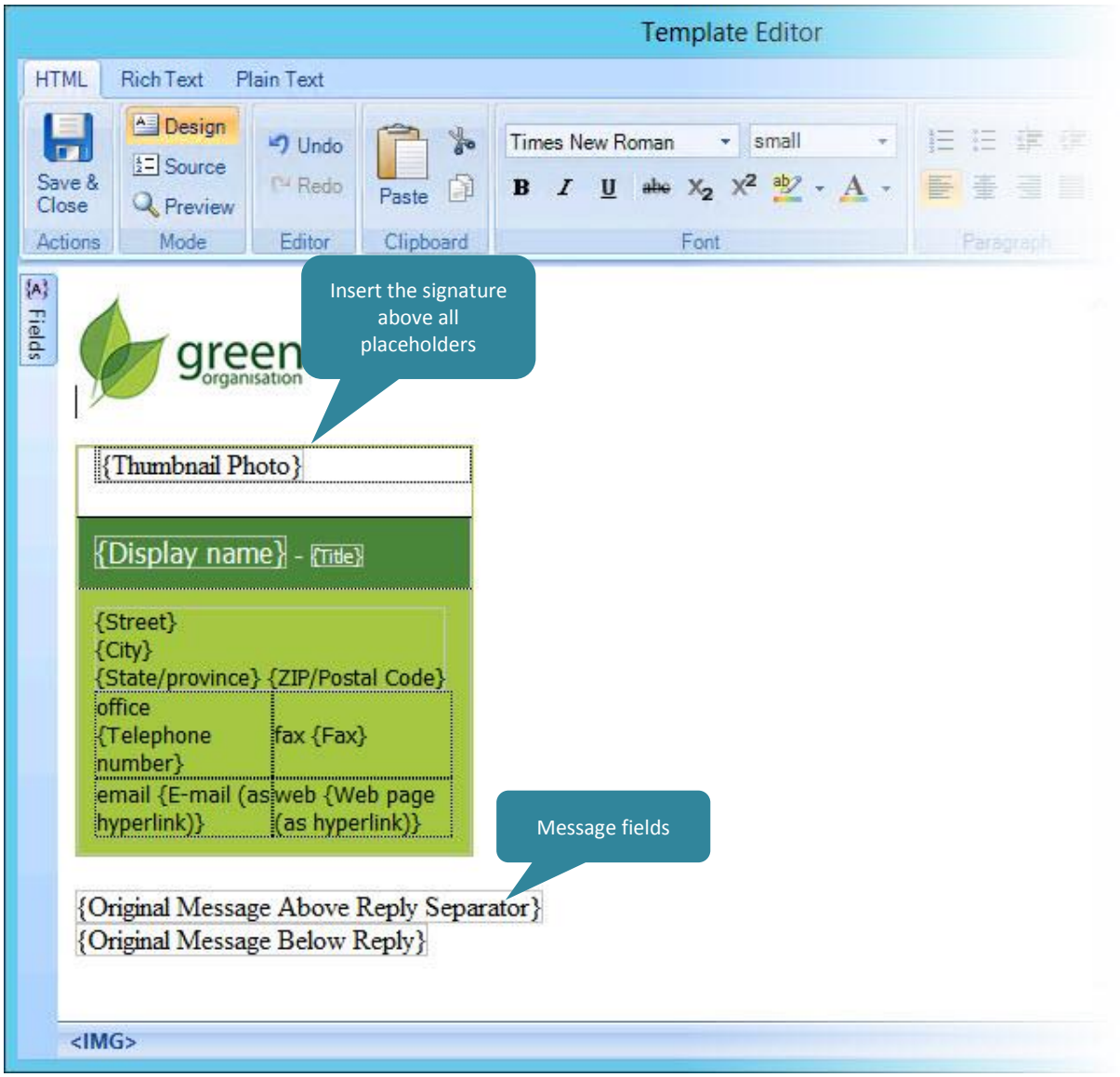
Placing Signature Content at the Very End of Original Messages

To place a signature at the very end of an email message, signature content should be placed below all original message fields, as shown below:



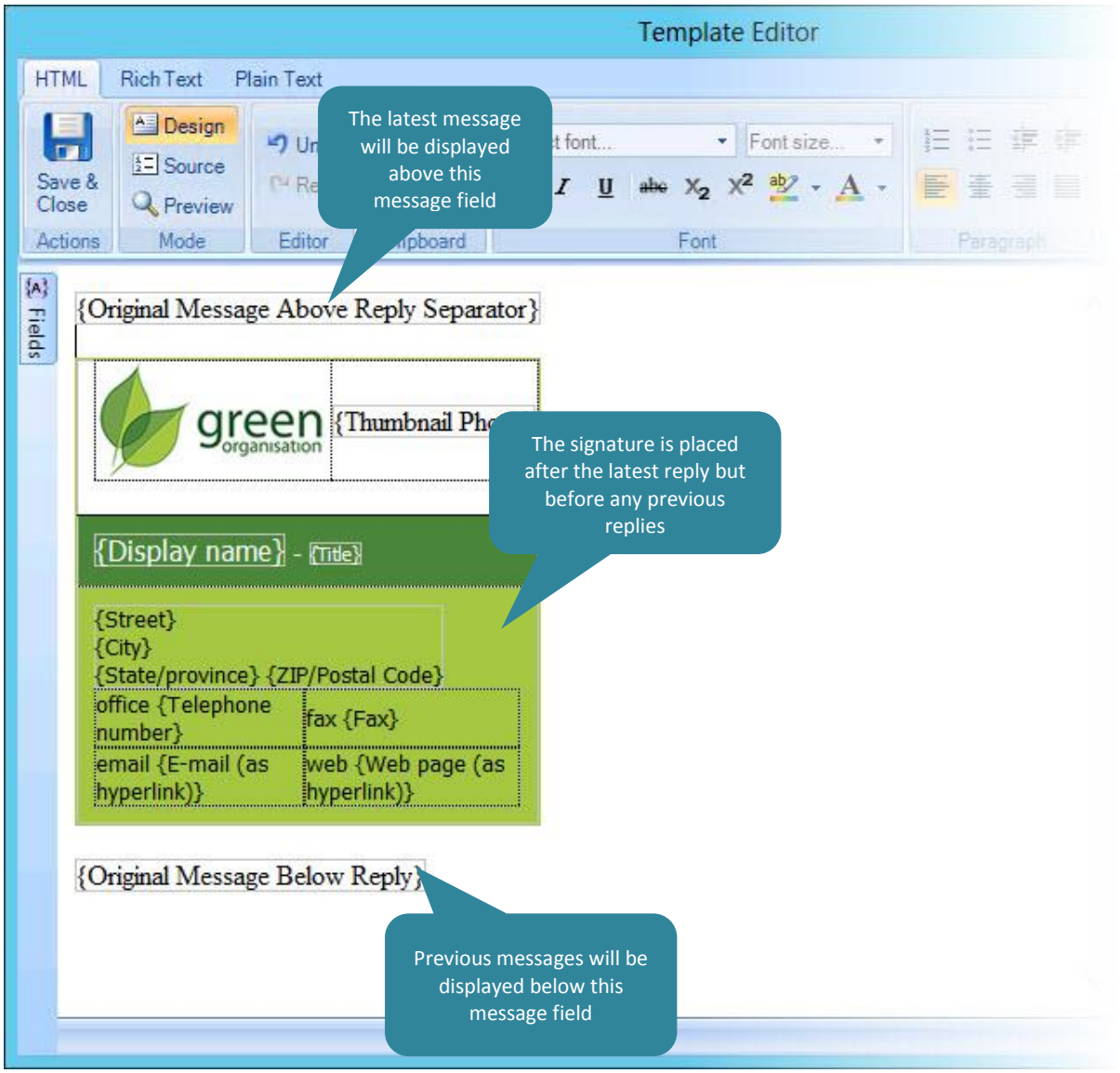
Placing Signature Content Above Original Messages

To place a signature at the very top of an email message, signature content should be placed above all original message placeholders, as shown below:



Placing Signature Content Below The Latest Message In An Email Conversation

To place the signature below the latest message in an email 'conversation', content should be placed between {Original Message Above Reply Separator} and {Original Message Below Reply} fields, as shown below:



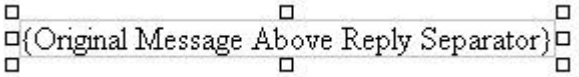
Tips for Working with Original Message Fields

Using Spaces Between Original Message Fields

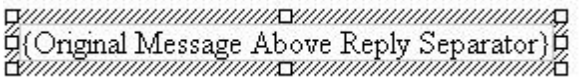
The placement of signature content will be made exactly as displayed in the editor. For example, if you enter three blank lines between an original message field and your signature content, there will be three blank lines at the end of email messages, followed by the signature.

Copying and Pasting Original Message Fields

You can copy and paste original message fields to new positions within the template, but care should be taken to ensure you copy/paste the entire field rather than just the text element. When you click on a field, it behaves like a table cell. For a correct selection, you should see the borders of the cell clearly marked:



...or

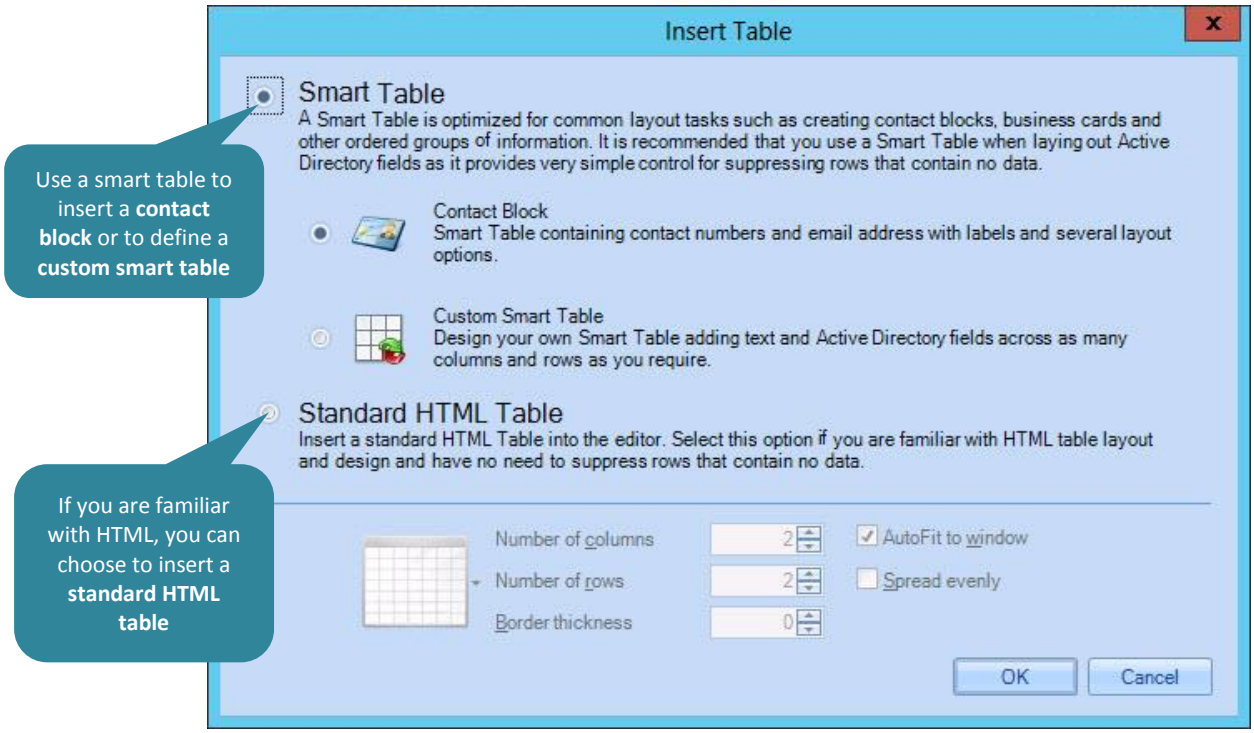


Formatting Original Message Fields

The way in which original message fields are formatted controls the formatting of the original message. For example, the font type, color, size, etc. applied to the fields will be reflected in email messages. So (for instance) if you want original messages to be formatted in Arial font, you would select these fields and apply the Arial font.

Tables

When working with HTML templates, using the table option from the editor toolbar displays an insert table options window:


Use a smart table to insert a **contact block** or to define a **custom smart table**
If you are familiar with HTML, you can choose to insert a **standard HTML table**
Insert Table
Smart Table
A Smart Table is optimized for common layout tasks such as creating contact blocks, business cards and other ordered groups of information. It is recommended that you use a Smart Table when laying out Active Directory fields as it provides very simple control for suppressing rows that contain no data.
Contact Block
Smart Table containing contact numbers and email address with labels and several layout options.
Custom Smart Table
Design your own Smart Table adding text and Active Directory fields across as many columns and rows as you require.
Standard HTML Table
Insert a standard HTML Table into the editor. Select this option if you are familiar with HTML table layout and design and have no need to suppress rows that contain no data.
Number of columns
2
AutoFit to window
Number of rows
2
Spread evenly
Border thickness
0
OK
Cancel

From here, you can choose the type of table to be inserted - choose from:

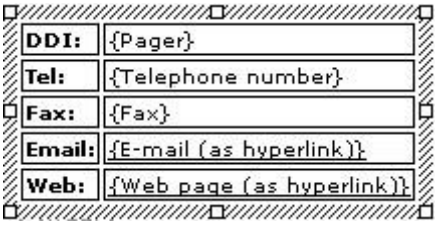
- A smart table - contact block [pg.213]
- A smart table - custom [pg.213]
- A standard HTML table [pg.213]

These options are summarized in the following sections.

Smart table - Contact Block

When working with templates, one of the most common requirements is to insert standard contact information for the message sender. You can do this by adding individual fields [pg.215] to the template, but it can be neater and quicker to use a predefined contact block.

A contact block is essentially a table of commonly used message sender fields - for example:



A key benefit of using a contact block rather than individual fields is that you can choose to suppress a row if there is no information in the message sender's Active Directory information to include. For example, if a contact block includes a {fax} field but there are no fax details for a message sender, the 'fax' row of the block is not displayed when the message is sent.

Once inserted, a contact block can be edited - for example, you might wish to swap one field for another, or adjust the formatting (using properties [pg.309]). For further information, please see how do I create a contact block? [pg.319]

NOTE

When the **contact block** is selected from the insert table options window, table rows and attributes are not available. This is because the **contact block** is a predefined table; however you can adjust the table once it has been inserted into the template.

Smart Table - Custom

The custom smart table option can be used to insert a table and specify content / attributes using straightforward data entry fields. This is a quick and easy way to insert a table and include Active Directory fields (or other content) at the same time; the alternative would be to insert a standard HTML table and add fields or other content manually.

For further information, please see the smart tables [pg.267] page.

Standard HTML Table

If you wish to insert a standard HTML table and do not wish to specify any content until after it has been added to the template, use the standard HTML table option. This is useful (for example) if you wish to insert a basic table to form the basic layout of a template, or if you wish to include tabular data which is not comprised of fields.

Having selected the standard HTML table option from the insert table window, you can set the number of columns and rows, together with border, autofit and spread attributes. Then, click OK to insert the table and start to add content.

When working with any kind of table in the HTML template editor, it may be useful to note the 'HTML element trail' at the bottom of the editor window:

Depending on the size of your table, it can sometimes be tricky to select a particular row, column or cell, but you can do this very easily from the element trail - just click the required element. When you click on an element, further options are displayed:

Selecting properties will show properties for this table element in the properties pane [pg.309].

Fields

Signatures can include a wide range of dynamic information using Active Directory fields. These fields are inserted into templates (via the template editor [pg.190]) and then dynamically updated when messages are sent or received.

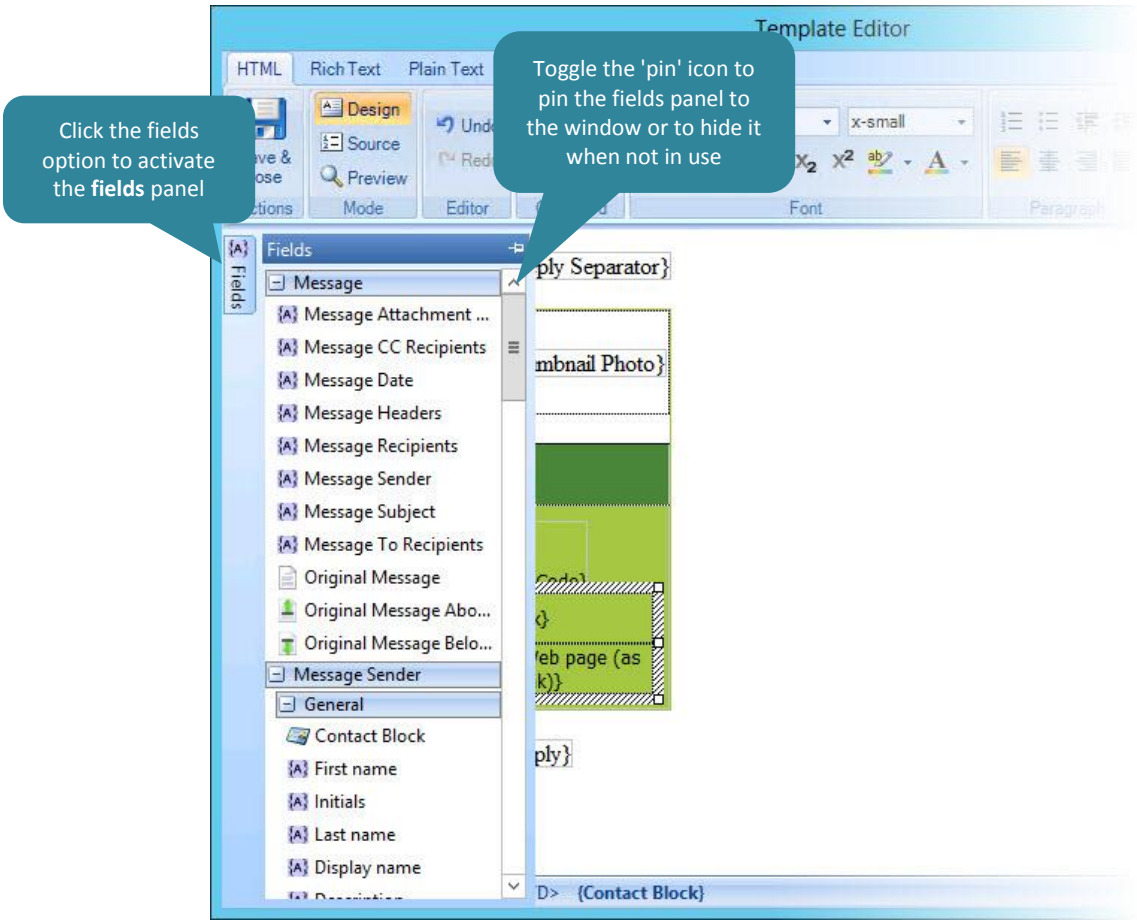
For example, you might define a template for a standard signature, which uses fields for the message sender's name, department and telephone number. Each time this template is applied to messages, the fields are replaced with the Active Directory content for these fields, for the sender.

Fields can be inserted into all template types - HTML, RTF and Plain Text. This section contains useful information for working with fields, including:

- Working with the fields panel [pg.216]
- Working with fields [pg.217]
- Available fields [pg.218]

Working with the Fields Panel

When not in use, the fields panel is hidden, to avoid cluttering editing space in the template editor [pg.190]. To activate this panel, click the fields option on the top, left-hand side of the template editor:



If you wish to keep the fields panel open, click the 'pin' icon in the top right-hand corner of the fields panel. This is a toggle option, click it once to 'pin' the panel to the editor and click it again to hide it again. Within the fields panel, fields are organized into related groups, namely:

- Message [pg.219]
- Message sender [pg.223]
- Dynamic content [pg.231]
- Server [pg.269]
- Advanced [pg.270]
- General [pg.308]

To insert a field, simply double click the required entry in the panel. The field is inserted and the fields panel closes automatically, so you can start working with the field [pg.217] in the editor.

Working with Fields

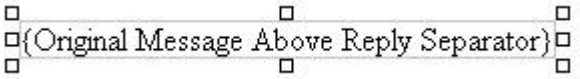
The following tips may be useful when you are working with fields.

Using Spaces Between Original Message Fields

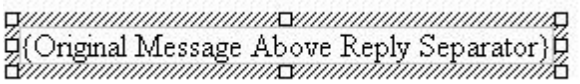
The placement of signature content will be made exactly as displayed in the editor. For example, if you enter three blank lines between an original message field and your signature content, there will be three blank lines at the end of email messages, followed by the signature.

Copying & Pasting Original Message Fields

You can copy and paste original message fields to new positions within the template, but care should be taken to ensure you copy/paste the entire field rather than just the text element. When you click on a field, it behaves like a table cell. For a correct selection, you should see the borders of the cell clearly marked:



...or



Formatting Original Message Fields

The way in which original message fields are formatted controls the formatting of the original message. For example, the font type, color, size, etc. applied to the fields will be reflected in email messages. So (for instance) if you want original messages to be formatted in Arial font, you would select these fields and apply the Arial font.

Available Fields

This section summarizes all fields that can be used when defining templates in Exclaimer Signature Manager Exchange Edition:

- Message [pg.219]
- Message sender [pg.223]
- Dynamic content [pg.231]
- Server [pg.269]
- Advanced [pg.270]
- General [pg.308]

Message Fields

Fields in the message group are summarized below:

Field	Inserts...
Message Attachment Name	The name of the message attachment(s).
Message CC Recipients	Any email addresses specified in the CC field.
Message Date	The message sent or received date.
Message From	Displays the email address in the 'from' field in the message. Typically, 'message from' and 'message sender' information is the same but there may be occasions where there is a difference - for example, when the 'sent on behalf of' option is used.
Message Headers	Header information from the email message.
Message Recipients	The email address of all recipients of the email (i.e. those specified in the To field and the CC field).
Message Sender	The email address of the message sender.
Message Sent On Behalf Of	Behind the scenes, every sent email includes two addresses which are associated with who is sending the message - the envelope sender and the from address. The envelope sender is the address that physically sent the message (and where computers should respond in the case of bounced messages or errors) and the from address is the address to be used by recipients when responding. Under normal circumstances, the envelope sender and the from address are the same and signature content is generated for the user found in the from address. However, the message sent on behalf of field is used for cases where a user is delegated to send email messages on behalf of another user. In this scenario, from and sender details will be different. For example, suppose a PA (Jane Smith) has permission to send email messages on behalf of a Company Director (Alice Jones). When received, these messages would be shown as ' from Jane Smith on behalf of Alice Jones'. Behind the scenes, the from address will have details for Alice Jones and the sender will have details for Jane Smith. The message sent on behalf of field retrieves the name of the person found in the from field, but only if it is different to data found in the envelope sender - otherwise it will be blank. Taking our example, the message sent on behalf of field would generate details for the Company Director, Alice Jones.
Message Subject	The content of the message subject line.

Field	Inserts...
Message To Recipients	The email address of all recipients entered in the To field.

.../continued

Field	Inserts...
Original Message	The original message content. Use this field to place signatures at the very start or very end of messages. If you wish to consider reply separators when placing signature content, you should use Original Message Above Reply Separator and Original Message Below Reply fields, described below.
Original Message Above Reply Separator	Original message content from the latest message in an email thread (conversation). This is used in conjunction with the {Original Message Below Reply } field. See placement of signature content [pg.207] for further information.
Original Message Below Reply	Original message content from the previous message in an email thread (conversation). This is used in conjunction with the {Original Message Above Reply Separator} field. See placement of signature content [pg.207] for further information.

Message Sender Fields

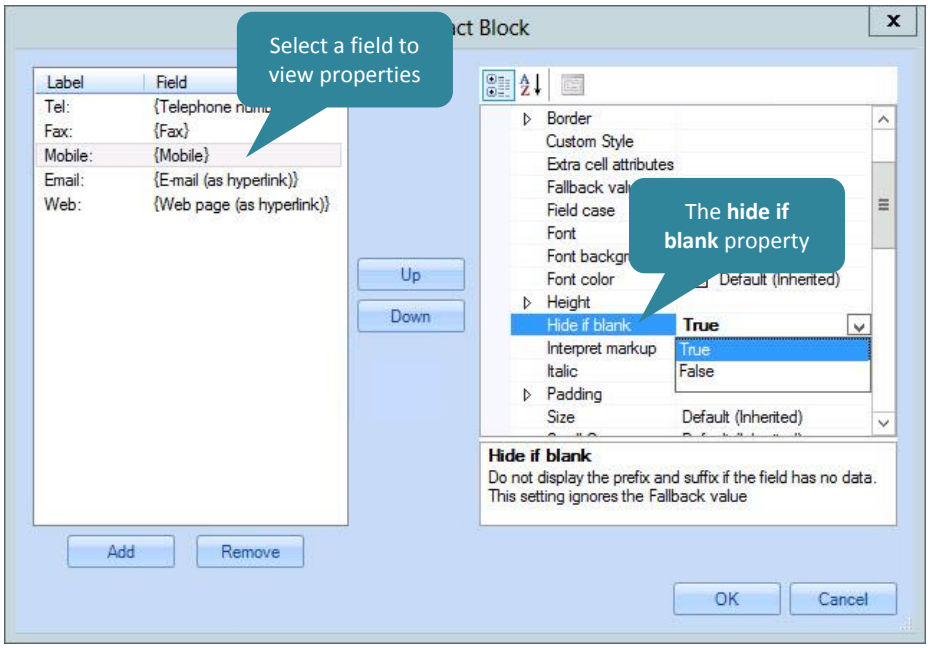
This section summarizes message sender fields which can be used when defining templates in Exclaimer Signature Manager Exchange Edition:

- General [pg.223] [pg.223]
- Address [pg.226] [pg.226]
- Telephones [pg.228] [pg.228]
- Organization [pg.229] [pg.229]
- Exchange Advanced [pg.230] [pg.230]
- AD Photos [pg.230]
- Other AD Fields [pg.230]

Message Sender - General Fields

Fields in the message sender - general section are summarized below:

Field	Inserts...
Contact Block	A block of contact information for the sender in tabular form. Use this option to select fields to be grouped in a table as a standard contact block - for example: produces... .../continued

Field	Inserts...
	This is the best way to add a signature to an email, since you can suppress fields if they are blank and so avoid blank lines in a signature (or any other block of fields). Once a contact block has been added, double-click anywhere inside it to open the contact block window:  Use this window to add/remove fields and update properties (you can select any field and set the hide if blank property to true if you wish to suppress this line for contacts where no information is present for the field). For further information please refer to how do I create a contact block? [pg.319]
First Name	The first name of the message sender.
Initials	Initials for the message sender.
Last name	The last name of the message sender.
Display name	Display name for the message sender.
Description	Description information for the sender.
Office	Office information for the sender.
Telephone Number	Telephone number for the sender.
Other Telephone Number	Other telephone number for the sender.

...continued

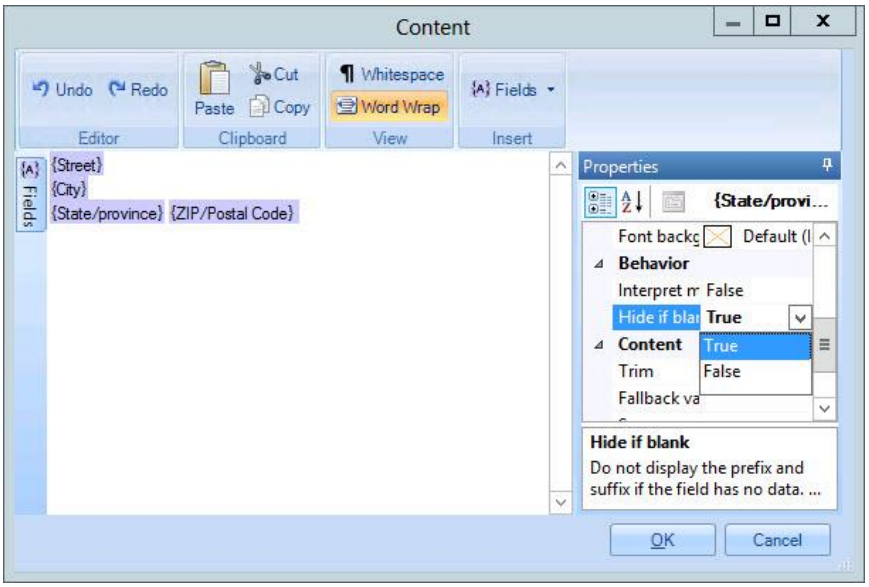
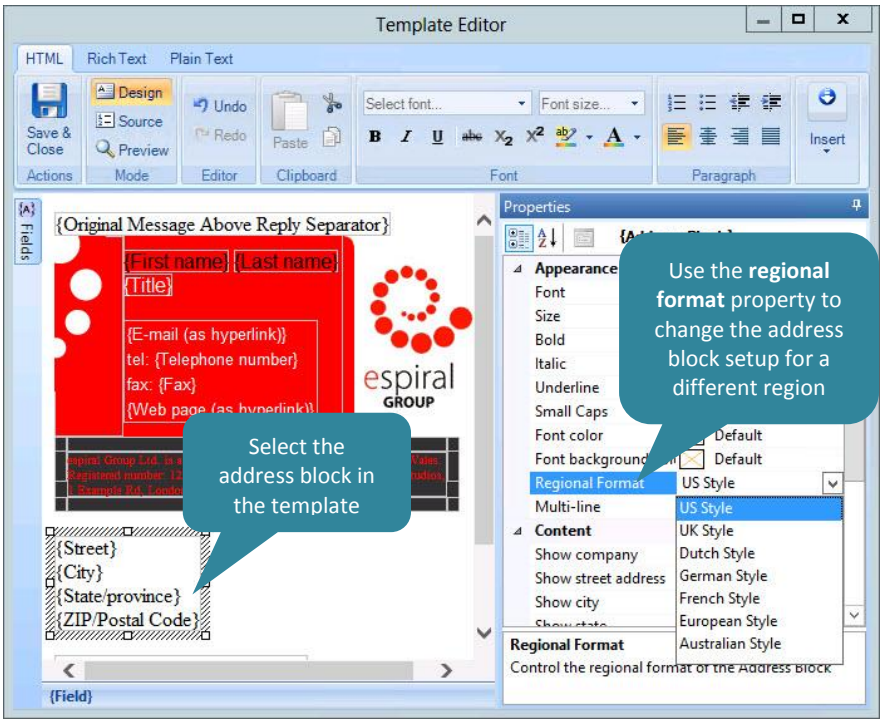
Field	Inserts...
E-mail	E-mail address for the sender.
E-mail (as hyperlink)	E-mail address presented as a hyperlink, for the sender.
Web Page	Web page address for the sender.
Web Page (as hyperlink)	Web page address for the sender, presented as a hyperlink.
Other Web Page	Alternative web page for the sender.
Personal Block	A short block of Active Directory fields presented in tabular form.

NOTE

This information is being taken from the **Active Directory**; therefore content may vary from one organization to another. For example, one organization may use the **office** field to indicate the office location in which a user is based, whilst another may use this field for something completely different.

Message Sender - Address Fields

Fields in the message sender - address section are summarized below:

Field	Inserts...
Address Block	A block of address information for the sender in tabular form. Includes street, city, state/province and zip/postal code. Once an address block has been added, double-click anywhere inside it to open the content window:  Items in the address block will vary between different regions (the default is for US style). You can easily change the region (and thus items in the address block) using the regional format property, shown below:  .../continued

Field	Inserts...
Street	Street information for the sender.
P.O. Box	P.O. Box information for the sender.
City	City information for the sender.
State/Province	State/province information for the sender.
Zip/Postal Code	Zip/postal code information for the sender.
Country/Region	Country/region information for the sender.
Country/Region (2 letters)	Two letter country abbreviation for the sender (e.g. UK).

NOTE

This information is being taken from the **Active Directory**; therefore content may vary from one organization to another. For example, one organization may use the **P.O. Box** field to indicate a genuine box number, whilst another may use this field for something completely different.

Message Sender - Telephone Fields

Fields in the message sender - telephone section are summarized below:

Field	Inserts...
Home	Home telephone number for the sender.
Other Home	Other home telephone number for the sender.
Pager	Pager number for the sender.
Other Pager	Other pager number for the sender.
Mobile	Mobile telephone number for the sender.
Other Mobile	Other mobile number for the sender.
Fax	Fax number for the sender.
Other Fax	Other fax number for the sender.
IP Phone	IP phone number for the sender.
Other IP Phone	Other IP phone number for the sender.
Notes	Notes for the sender.

NOTE

This information is being taken from the **Active Directory**; therefore content may vary from one organization to another. For example, one organization may use the **notes** field to enter telephone related notes, whilst another may use this field for something completely different.

Message Sender - Organization Fields

Fields in the message sender - organization section are summarized below:

Field	Inserts...
Title	The message sender's job title.
Department	The department in which the message sender works.
Company	The company for whom the message sender works.
Manager Display Name	The name of the message sender's manager.
Manager E-mail	The email address of the message sender's manager.
Manager E-mail (as hyperlink)	The email address of the message sender's manager, presented as a hyperlink.

NOTE

This information is being taken from the **Active Directory**; therefore content may vary from one organization to another. For example, one organization may use the **department** field to enter true department information, whilst another may use this field for something completely different.

Message Sender - Exchange Advanced Fields

Fields in the message sender - exchange advanced section are custom exchange fields, typically used for organization-specific information. Use of these fields will vary from one installation to another.

Message Sender - AD Photos Fields

Fields in the AD photos section are summarized below:

Field	Inserts...
JPEG Photo	Insert JPEG photo of the sender.
Photo	Insert other photo of the sender.
Thumbnail Logo	Insert thumbnail logo associated with the sender.
Thumbnail Photo	Insert thumbnail photo associated with the sender.

NOTE

Although the **Active Directory** includes fields for pictures, there is no in-built, straightforward way to add pictures to it. The Exclaimer Outlook Photos application allows you to create and manage images for all objects in your **Active Directory** - please contact us if you would like further information.

Message Sender - Other AD Fields

Fields in the other AD fields section are summarized below:

Field	Inserts...
Home Address	Insert the sender's personal home address.
Personal Title	Insert the sender's personal title.
Postal Address	Insert the sender's personal postal address.
AD Field	Insert information held in the custom AD field for the sender.

NOTE

This information is being taken from the **Active Directory**; therefore content may vary from one organization to another. For example, one organization may use the **postal address** field to enter a genuine alternative address, whilst another may use this field for something completely different.

Dynamic Content Fields

This section summarizes dynamic content fields which can be used when defining templates in Exclaimer Signature Manager Exchange Edition:

- Content from file [pg.232]
- Custom hyperlink [pg.233]
- Custom image [pg.235]
- QR code [pg.237]
- Rotating banner ad [pg.246]
- RSS feed [pg.248]
- Composite field [pg.251]
- Social media strip [pg.252]
- List of fields [pg.260]
- Custom smart table [pg.267]

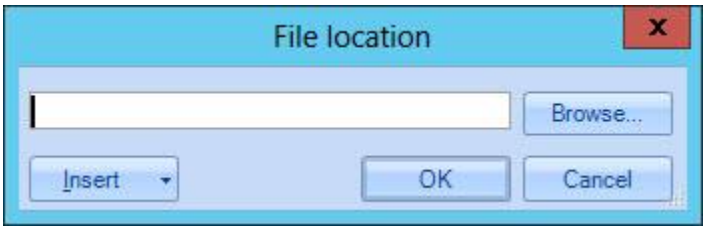
Content From File

The content from file field is used to insert content from an external document, by specifying a location for the required document (documents can be in HTML, Rich Text, Plain Text or image formats).

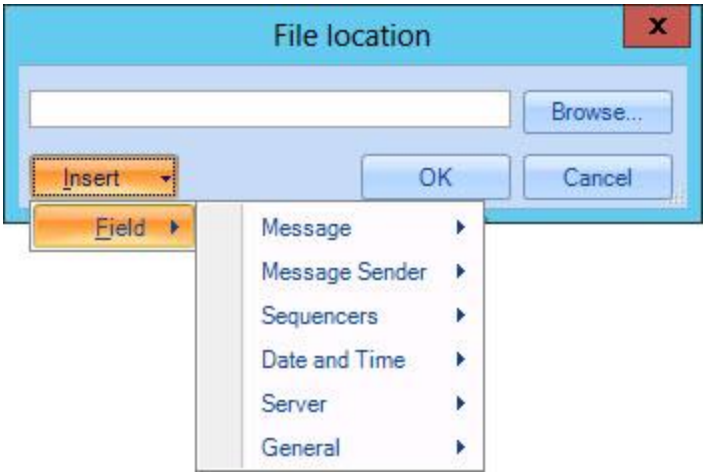
This is useful (for example) if you need to use signature content that is constantly being updated - rather than adding text directly into the template editor each time there is a change, simply specify a location to the original file and the latest content will always be included. The file location specified must be accessible to the network service user.

To use content from an existing file in a template, follow the steps below:

1. Use the fields panel to insert a content from file field. When this field is added to a template, the file location window is displayed:



2. Click the browse button to navigate drives and folders to locate the required file. Alternatively, use the insert button to select an Active Directory field to insert as the file source:



3. Click OK to confirm your selections.

NOTE

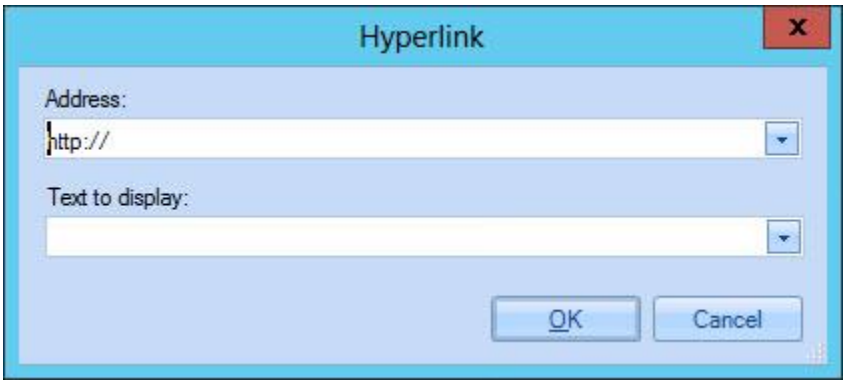
Remember that you can switch to **preview** mode (from the template editor toolbar [pg.200]) to see the effect of any dynamic fields you have inserted.

Custom Hyperlink

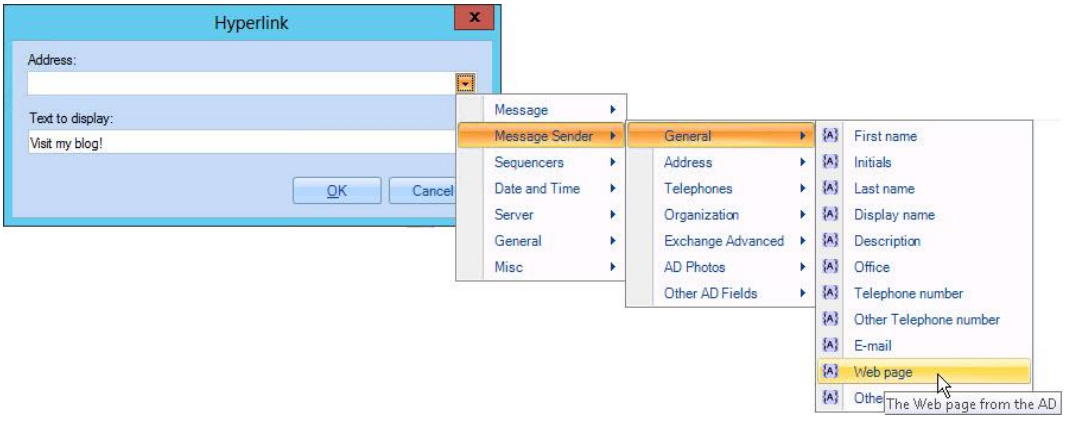
A custom hyperlink can be used to insert a standard hyperlink (i.e. a URL for a web page), and any other kind of link (for example, a mailto email link) - for example:

Additionally, it has the option to include other Active Directory fields. This means that you can create a custom hyperlink and insert (for example) the message sender > web page field to insert a link to the sender's own web page in the signature. To insert a custom hyperlink and specify a field within it, follow the steps below:

1. Use the fields panel to insert a custom hyperlink field. When this field is added to a template, the hyperlink window is displayed:



2. Click the down arrow associated with this field to select the required Active Directory field to insert as the link target (for example, you might wish to use the message sender's web page):



3. Enter text that users click to activate the link. Note that this text is only displayed when the template is in preview mode [pg.200], or when the template is applied to email messages.

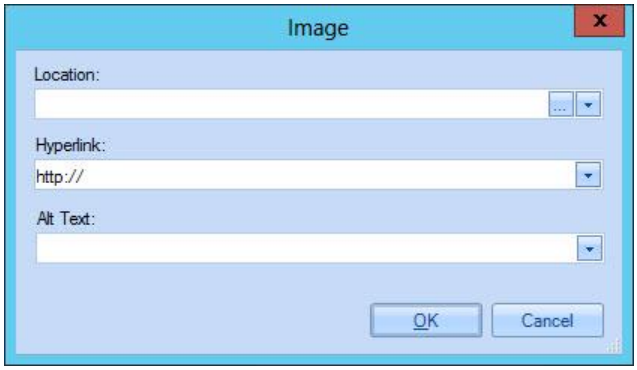
4. Click OK to confirm details.

Custom Image

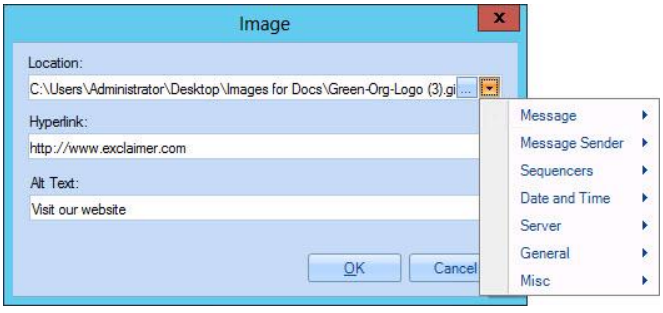
The custom image field allows you to insert an image and use it as a trigger for a hyperlink - for example:

When the recipient clicks on the image, the specified web page will open in their default browser. You can specify an image from a specific file location, or from an Active Directory field. To do this, follow the steps below:

1. Use the fields panel to insert a custom image field. When this field is added to a template, the image window is displayed:



2. Enter link information for the image, as summarized below:

Item	Summary
Location	Click the browse - ... - button to the right of the location field to navigate drives and folders to specify an image location. Alternatively, click the down arrow associated with this field to select an Active Directory field to insert as the image source (for example, you might wish to use the message sender's thumbnail photo):  .../continued

Item	Summary
Hyperlink	Use this option to add a hyperlink for the image. Type the required URL into the hyperlink field (i.e. the web address that should be displayed when a user clicks the image in the message. Alternatively, click the down arrow associated with this field to select an Active Directory field to insert as the link (for example, you might wish to use the message sender's web page).
Alt Text	Enter text to be displayed when the recipient hovers their mouse over the image, or if the image cannot be displayed.

NOTE

Remember that you can switch to **preview** mode (from the template editor toolbar [pg.200]) to see the effect of any dynamic fields you have inserted.

QR Code

The QR code (Quick Response code) field is used to insert special barcode type images which can be scanned by QR scanners and smartphones - for example:

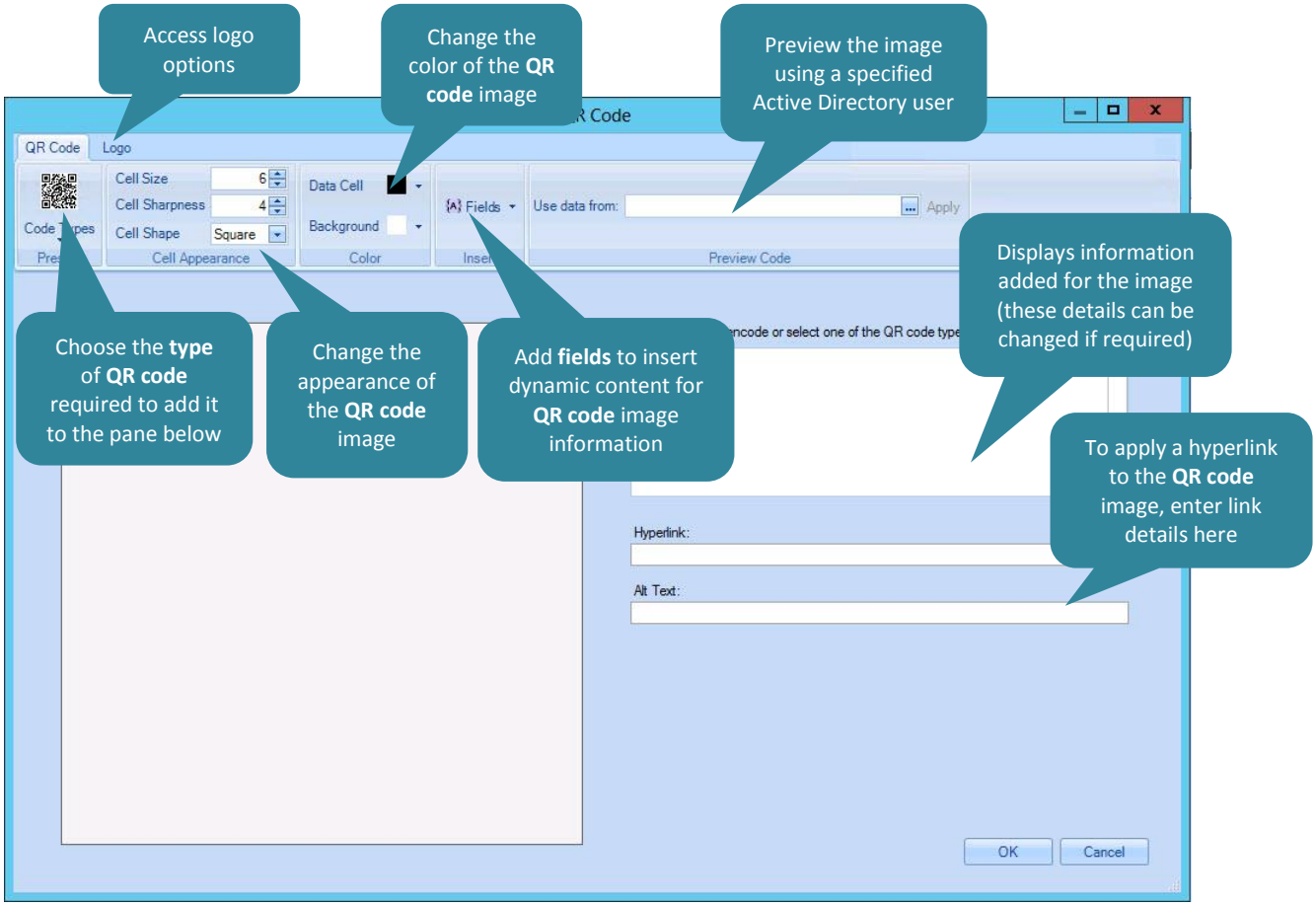
These images contain information comprised of text and/or other fields - for example, you might include contact information, website details, etc. Using Exclaimer Signature Manager Exchange Edition, you can add a QR code [pg.238] and in doing so, specify:

- The type of QR code that is required (i.e. the type of information to be encapsulated - URL, contact, calendar event, etc.)
- How the QR code should be displayed (size, sharpness, shape, color and background)
- Any text, Active Directory fields and hyperlink details to be associated with the QR code

If required, you can also use logo options [pg.242] to display a given logo with the QR code. You can choose to display the logo as a background, in the center of the QR code or in a user defined position.

Adding a QR Code to a Template

To add a QR code image, use the fields panel to insert a QR code field. When this field is added to a template, the QR code window is displayed:


Access logo options
Change the color of the QR code image
Preview the image using a specified Active Directory user
Displays information added for the image (these details can be changed if required)
To apply a hyperlink to the QR code image, enter link details here
Choose the type of QR code required to add it to the pane below
Change the appearance of the QR code image
Add fields to insert dynamic content for QR code image information
QR Code
Logo
Cell Size
Cell Sharpness
Cell Shape
Square
Data Cell
Background
Fields
Use data from:
Apply
Cell Appearance
Color
Preview Code
Hyperlink:
Alt Text:
OK
Cancel

From here:

1. Use the code type drop-down list to choose the type of QR code image that you wish to create. You can choose one of the following options:

Action	Summary
URL	Displays a URL window - enter the full URL for the website that you wish to include within the image.
Contact Details	Displays a contact details window which is pre-populated with name, telephone, email and address fields from the Active Directory. If required, use arrows associated with each field to make changes.
Calendar Event	Displays a calendar event window so you can add event name, location, time zone and the event start/end times.
Map Location	Displays a map location window so you can enter latitude and longitude coordinates.

Action	Summary
Telephone Number	Displays a telephone number window which is pre-populated with the telephone field from the Active Directory. If required, use the arrow associated with this field to make changes.
SMS Text	Displays the SMS text window. Here, enter the required telephone number (if required, use the arrow associated with this field to populate it via an Active Directory field). Then, enter required text for the SMS text message in the field below (you can use the insert button to include Active Directory fields here). NOTE Text messages are limited to 160 characters in length - any content after 160 characters will be truncated.

2. Having selected the code type and entered associated details, the image and any details that you entered are added to the QR code window. From here you can use toolbar options to:

   - Change the size, sharpness and shape of the QR code image
   - Change the color of the image (i.e. the actual composite parts) and/or the image background
   - Click in the information pane (populated with details you have entered so far) and insert Active Directory fields
   - Preview the image using details for a selected user

3. If you would like recipients to be able to click on the QR code image to access a website (or perhaps a mailto link), enter link details using hyperlink and alt text fields.

4. If required, click the logo tab (at the top of the window) to apply a logo to the image. Here, you can browse for the required logo, or use the arrow associated with the logo field to add a logo via an Active Directory field.

5. Click OK to confirm details and add the QR code image to the template.

NOTE

Certain combinations of images and colors may produce a **QR code** that is not always readable. We advise customers test the **QR code** with a smartphone to ensure it works as expected, before releasing it in a signature.

To edit the properties of an existing **QR code** image in a template, simply double-click the image to access the **QR code** window.

Changing the Size of the QR Code

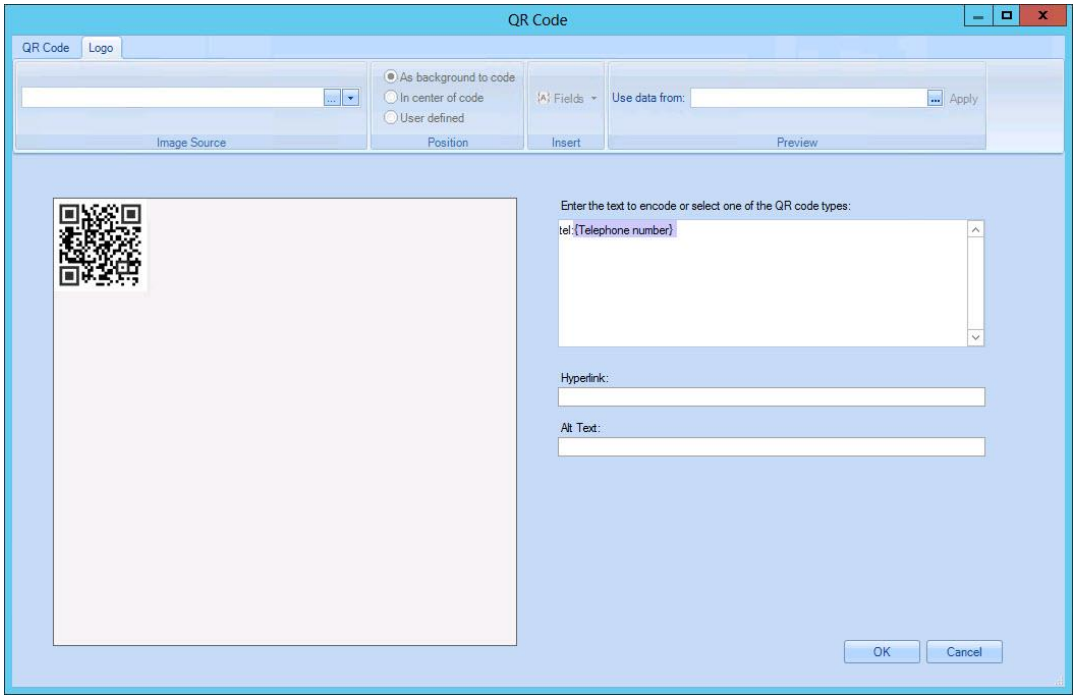
Having defined a QR code in the QR code window, the image can be resized as required. To resize the image, hover your cursor over the marker in the bottom left-hand corner of the image to enable sizing grab handles:

Having done this, you can simply drag the image to the required size:

Adding a Logo Image

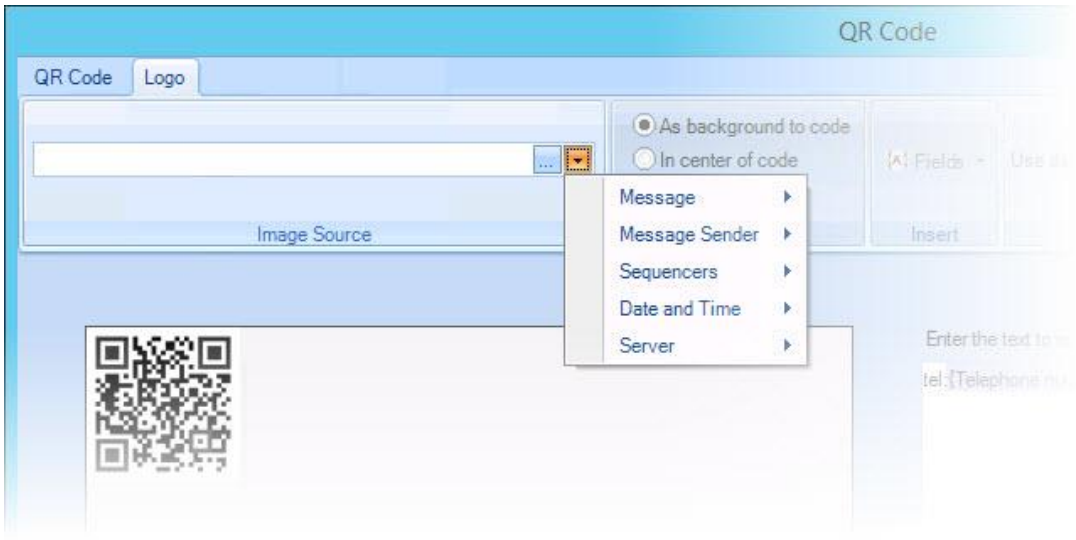
If required, you can choose to associate a logo (or any other image) with a QR code. A logo image can be displayed as a background for the QR code, in the center of the QR code or in a user defined position [pg.243].

To add a logo image, select the logo tab from the QR code window. Here, the QR code image is displayed (but cannot be adjusted [pg.243]) so you can see how it will look with your selected image:



If you are adding a logo image from a file on your computer or network, select the browse [...] button associated with the image source field to locate and select the required image file.

Alternatively, you can add a logo image via an Active Directory field. To do this, select the arrow associated with the image source field and choose the required field:



The selected image is displayed with the QR code. By default, it is set as background to the code - if required, use position options to change this.

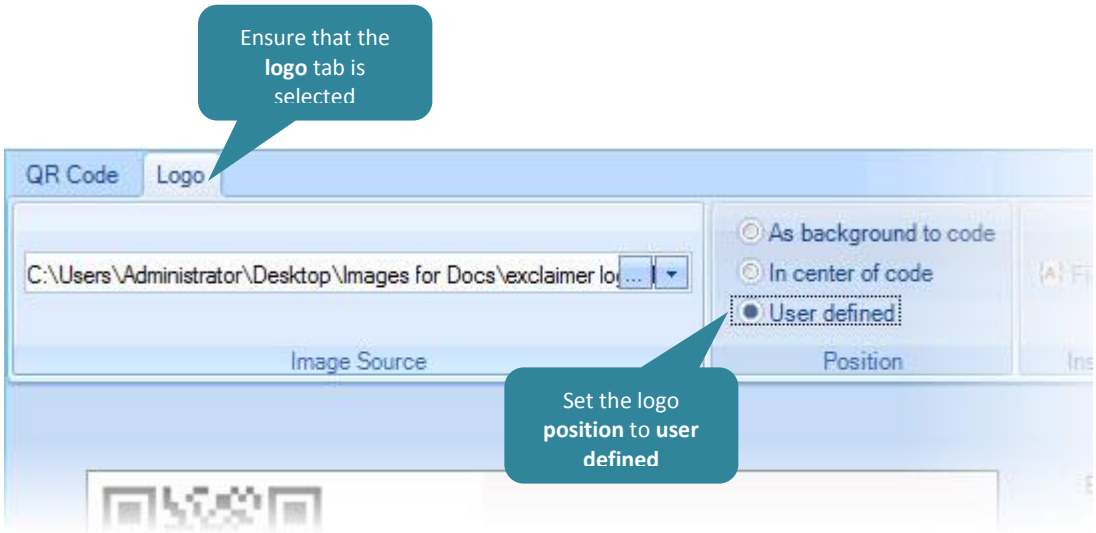
If the position is set to in center of code, the logo image is positioned in the center of the QR code - for example:

When the position is set to as background to the code or in center of code, the image is automatically scaled for a best fit with the QR code (if you subsequently change the size of the QR code, the logo image is scaled accordingly).

When the position is set to user defined, you can adjust the size and the position of the logo image manually - please see repositioning a QR code and logo manually [pg.243] for further information about this option.

Repositioning a QR Code and Logo Manually

If you have added a logo image and you wish to manually control the position and/or size of that image in relation to the QR code, access the logo tab and set the position to user defined:



Having done this, the logo is separated from the QR code. To move the logo, hover your cursor over the logo image to enable positioning grab handles and simply drag it to the required position - for example:

Hover the cursor over the image to enable positioning grab handles
The image can be dragged to any new position - i.e. above, below, adjacent to or behind the **QR code**

NOTE

Notice that the **logo** image is displayed with resizing 'handles' (one in each corner). If required, use these to scale the image up or down.

When you are repositioning the logo, the QR code image is also displayed so you can easily position the logo in relation to the QR code. However, the QR code cannot be moved or adjusted here.

To adjust the position (and other settings) for the QR code, select the QR code tab. Here you will see the QR code and the logo, but only the QR code can be adjusted. Hover your cursor over the QR code image to enable positioning grab handles - then, simply drag it to the required position.

In summary, although the QR code and the logo image are associated with each other, each of these items can only be adjusted within its respective QR code or logo tab.

NOTE

Keep in mind that you are positioning the **logo** in relation to the **QR code** (or vice versa) - you are not specifying where these items are positioned within the template.

Once the **QR code** and any associated **logo** are confirmed (and the **QR code** window is closed), their ultimate position and alignment within the template is controlled by any settings and properties associated with the **QR code** element in the template editor, as with any other field.

Optimizing the display of QR codes and logos

Each QR code is comprised of cells, as shown below:

Using cell appearance and color settings for the QR code, you can control the size, sharpness, shape, color and background of these cells:

When a QR code is first added, these settings are automatically defined to display the code with optimal clarity. However, if you are also using a logo image, you may need to adjust these settings to ensure that the logo is displayed clearly.

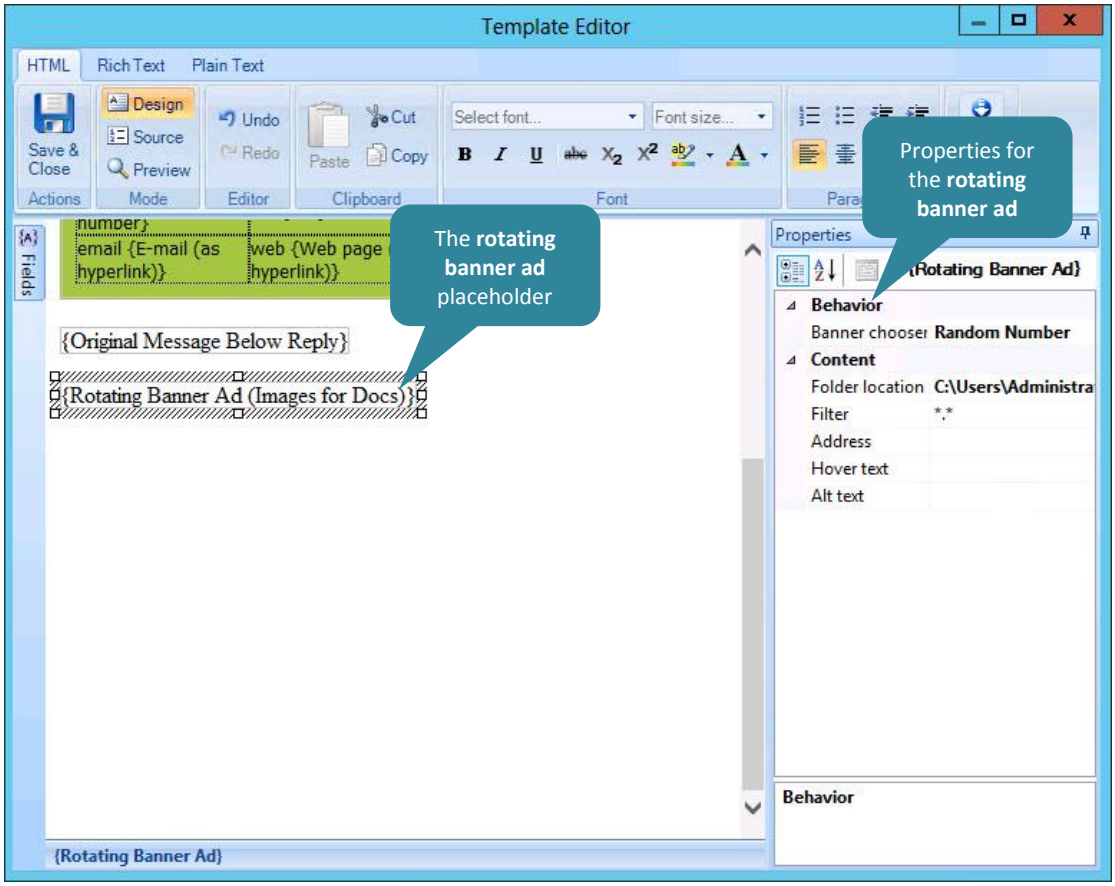
This is particularly relevant where the position of the logo image is set to as background to the code or user defined. With default cell appearance settings, the logo image is typically obscured by the QR code however, reducing the cell size and cell sharpness will increase transparency, making the logo image clearer. You may also find that adjusting the cell shape and color settings for the QR code also helps with the clarity of a logo image.

Rotating Banner Ad

The rotating banner ad field allows you to place multiple images in a given folder location so when displayed in messages, the image changes (rotating through images in the given folder). Images can be associated with a (single) hyperlink so, when clicked, the given web address is displayed. Image rotation can be set to either random or sequential.

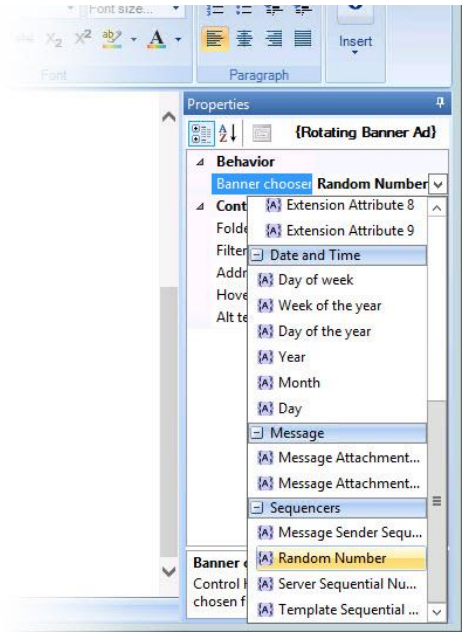
To add a rotating banner ad, follow the steps below:

1. Use the fields panel to insert a rotating banner ad field.
2. Select the newly inserted field and check the properties pane - properties for the image are shown:



3. Select the drop-down list to the right of the banner chooser field.

4. Scroll down to the sequence section and choose whether to display images in sequence, or randomly:



5. Set remaining properties as follows:

Action	Summary
Folder Location	Click the browse - ... - button to open the folder location window and click browse to navigate drives and folders to specify a folder location. Alternatively, click insert to navigate available fields and select an Active Directory field to insert as the location.
Filter	If required, you can use wildcards so that only certain images are used (for example, you might wish to use a series of images which start with '13' and would therefore specify '13*.*' or you might only wish to use JPEG images and therefore specify '*.JPG'.
Address	Use this option to apply a hyperlink to banner images. Click the browse - ... - button to open the address window and type the required URL into the address field (i.e. the web address that should be displayed when a user clicks the image in the message). Alternatively, click insert to navigate available fields and select an Active Directory field as the link target (for example, you might wish to use the message sender's web page).
Hover Text	Enter text to be displayed when a user hovers the cursor over a rotating banner ad image.
Alt Text	Enter text to be displayed if images cannot be displayed.

NOTE

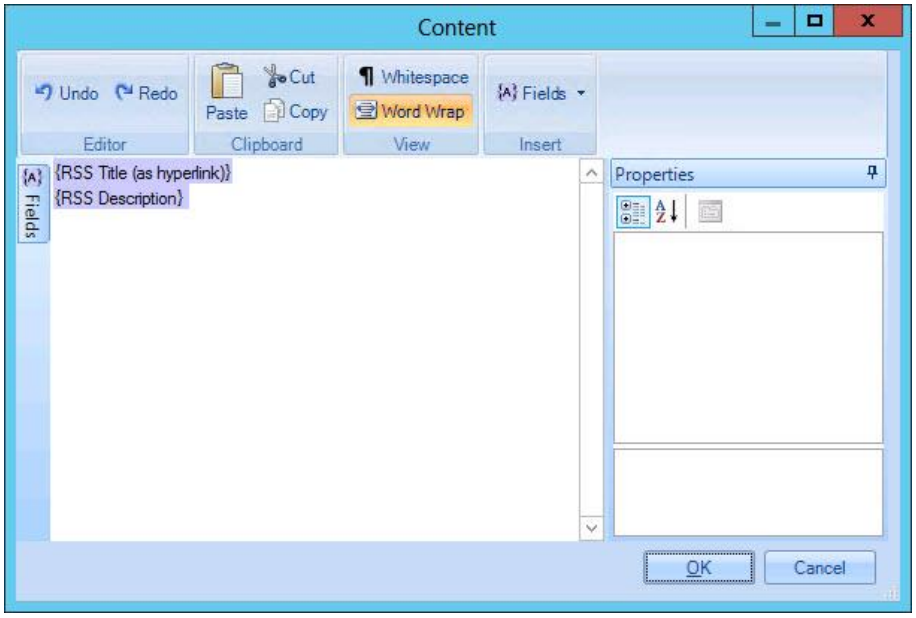
Remember that you can switch to **preview** mode (from the template editor toolbar [pg.200]) to see the effect of any dynamic fields you have inserted.

RSS Feed

The RSS feed field is used to insert an RSS feed into email messages - for example:

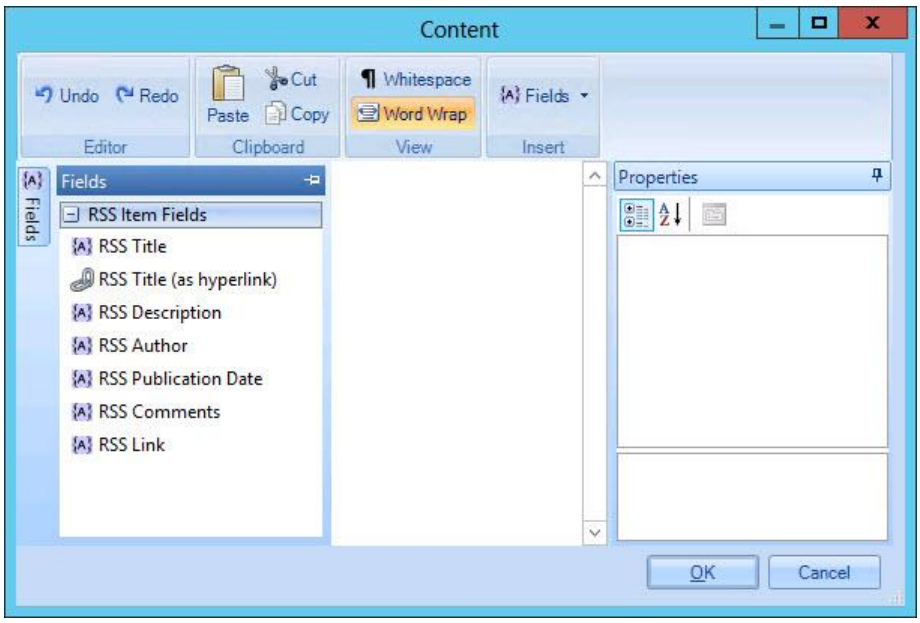
green
organisation
Karen Green - Marketing Manager
Suite 15
10 High Street
Fleet
Hampshire GU54 9UK
office +44 (0) 1252 987 456 fax +44 (0) 1252 987 456
email kareng@greenorg.net web www.greenorg.net
Space Exploration
Sky watchers in Europe, Asia, and parts of Alaska and Canada will experience a partial eclipse of the Sun on Saturday, May 31st.

To insert an RSS feed, use the fields panel to insert an RSS feed field. When this field is added to a template, the content window is displayed:



This window is used to determine which RSS feed elements should be included in the template - i.e. what RSS details should be displayed when the email message is received. An RSS feed is comprised of a number of different elements. By default, the RSS Title (as hyperlink) and RSS Description elements are included, which means that recipients of the email message would see each RSS item with a title and summary text (as shown in the example at the start of this section).

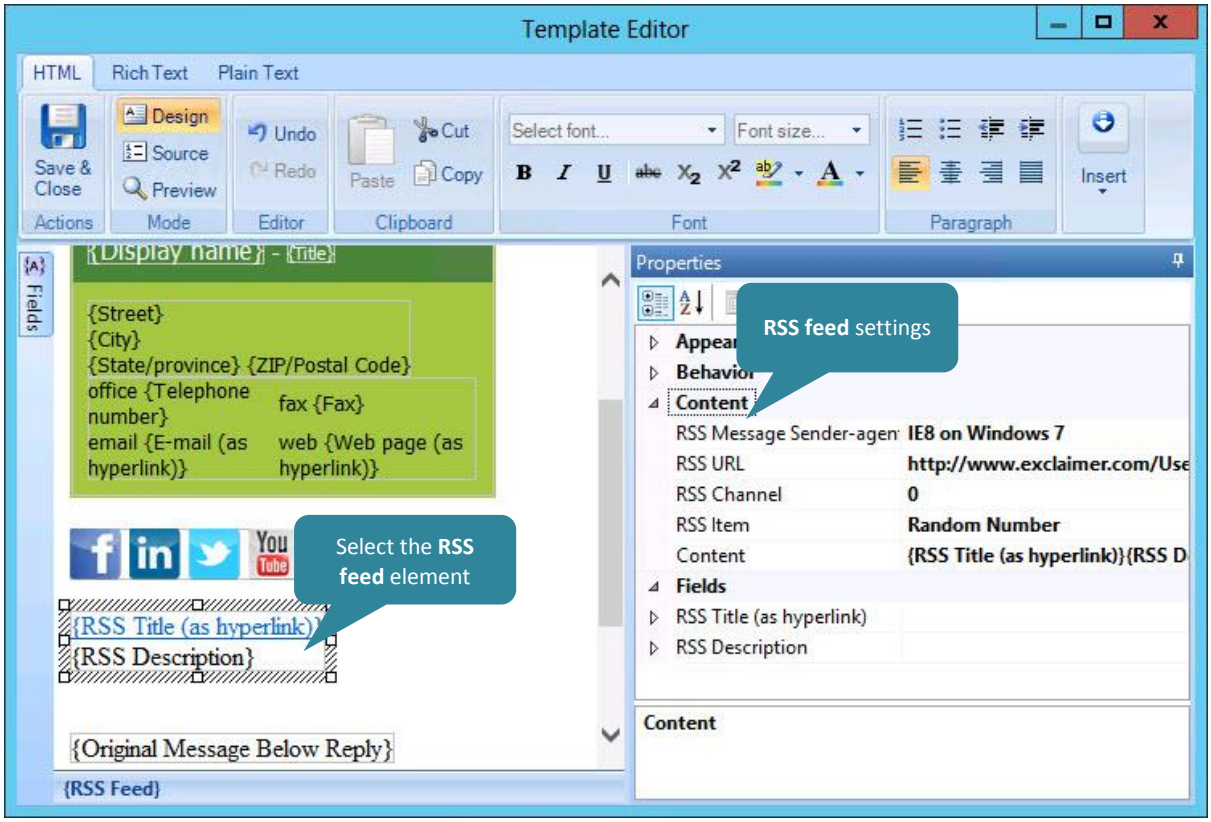
If required, you can change the composition of the RSS feed field via the fields panel in this window:



All RSS fields are available for selection and, as with any other field, properties are displayed in the right-hand pane when a field is inserted and then selected. However, these properties relate to each element of the RSS feed. Please refer to RSS feed properties [pg.250] for further information about defining properties for the RSS feed as a whole (i.e. to specify a URL and a channel).

RSS Feed Properties

Having added an RSS feed field and confirmed the required composite parts (as above), the RSS feed element is added to your template. When this element is selected, general settings for the RSS feed can be defined in the properties pane, within the content section:



Key properties are summarized below:

Action	Summary
RSS URL	Enter required URL for the feed.
RSS Channel	Some organizations have feeds with multiple channels - for example, one channel for news and another for announcements. Use this option if a specific channel selection is required.
RSS Item	Choose whether to display a random feed entry, or a sequential number. Use the drop-down list and scroll down to the sequencers section to change this setting.
Content	Any fields that have been included in the RSS feed element (as defined when the RSS feed field was added to the template [pg.248]) are shown here. If you wish to change these fields, click to activate this property and then select the browse - ... - button to open the content window.

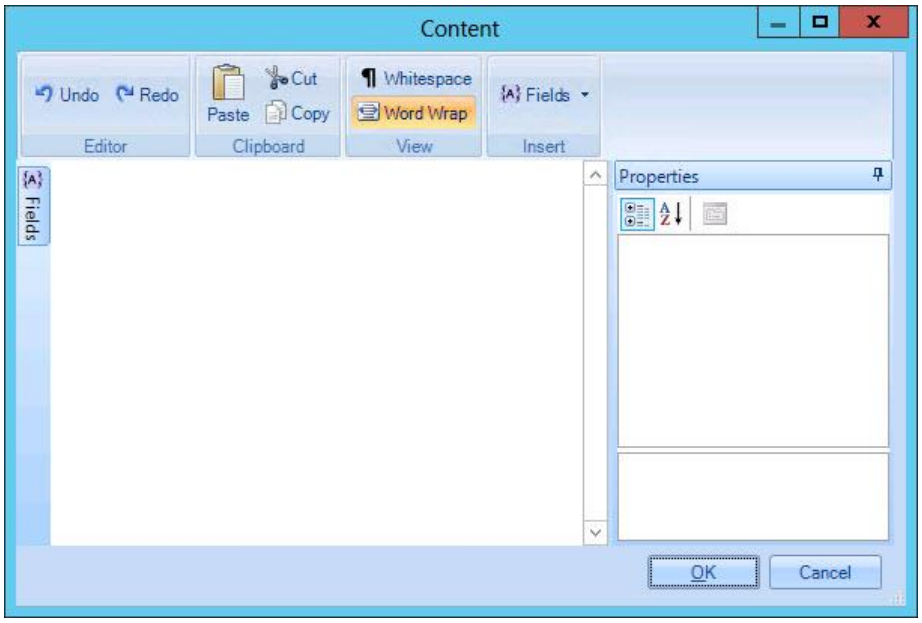
NOTE

Remember that you can switch to **preview** mode (from the template editor toolbar [pg.200]) to see the effect of any dynamic fields you have inserted.

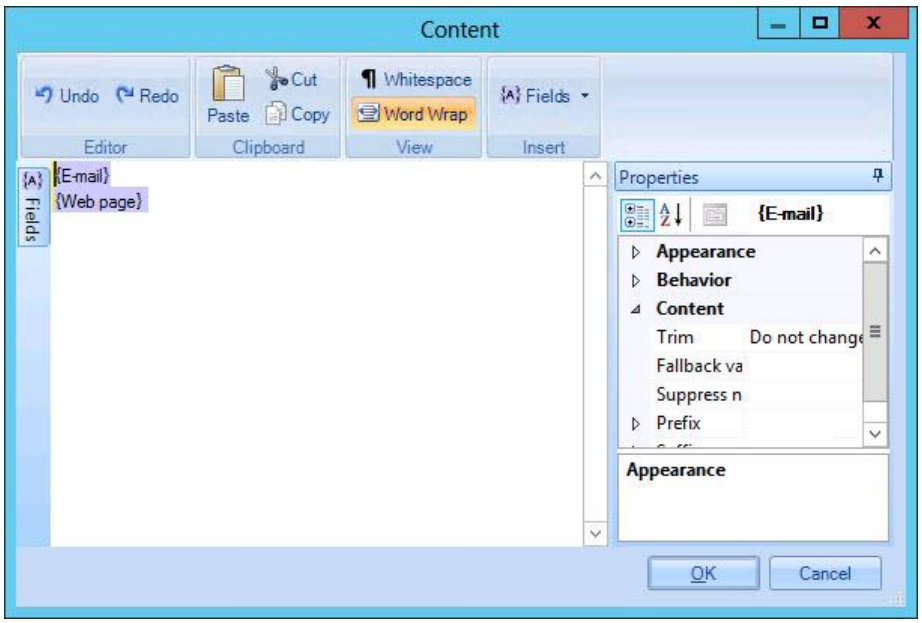
Composite Field

A composite field is used as a container for multiple fields that need to be used together. For example, you might define a composite field which contains department, company and sender's web page. A composite field might contain just fields, but it can also contain text. To define a composite field, follow the steps below:

1. Use the fields panel to insert a composite field. When this field is added to a template, the content window is displayed:



2. Use the fields panel to insert required fields - i.e. fields that will make up the composite field. Adding fields here works in exactly the same way as adding any sort of field - you can select any field that has been added and update properties in the right-hand pane:

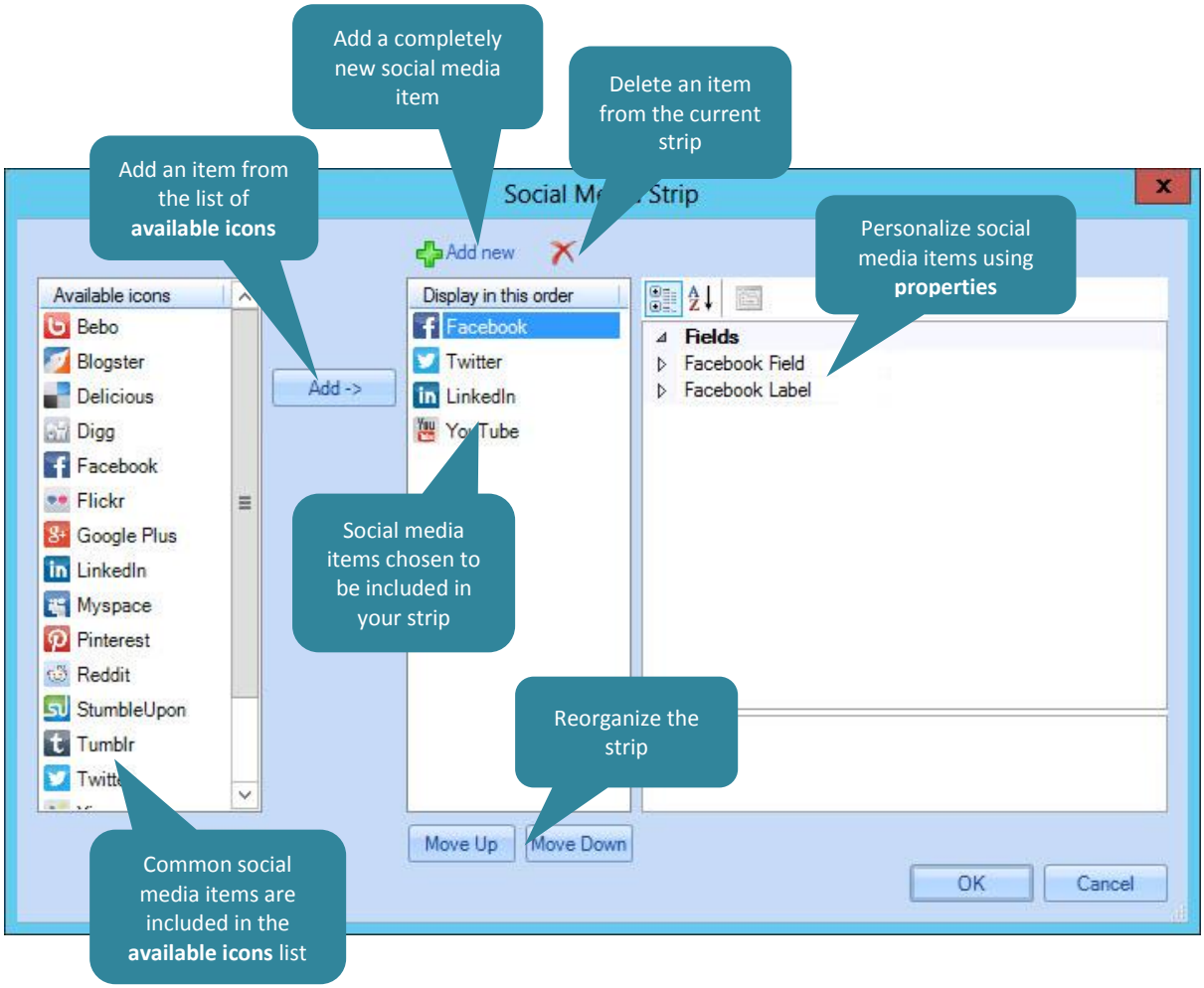


3. Having entered all required fields, click OK to exit from the content window and return to the template editor.

Social Media Strip

The social media strip field inserts a strip of predefined social media icons which can then be tailored to meet your requirements. By default, the social media strip includes icons (and associated properties) for Facebook, Linked In, Twitter, You Tube and Google Plus:

To add a social media strip to your template, select the social media strip field from the fields panel to access the social media strip window:



From here you can:

- Add an existing item to the social media strip [pg.253]
- Personalize items in the social media strip [pg.254]
- Add a new item to the social media strip [pg.257]
- Remove an item from the social media strip [pg.258]
- Re-organize the social media strip [pg.259]
- Customize the social media strip [pg.259]

Adding an Existing Item to the Social Media Strip

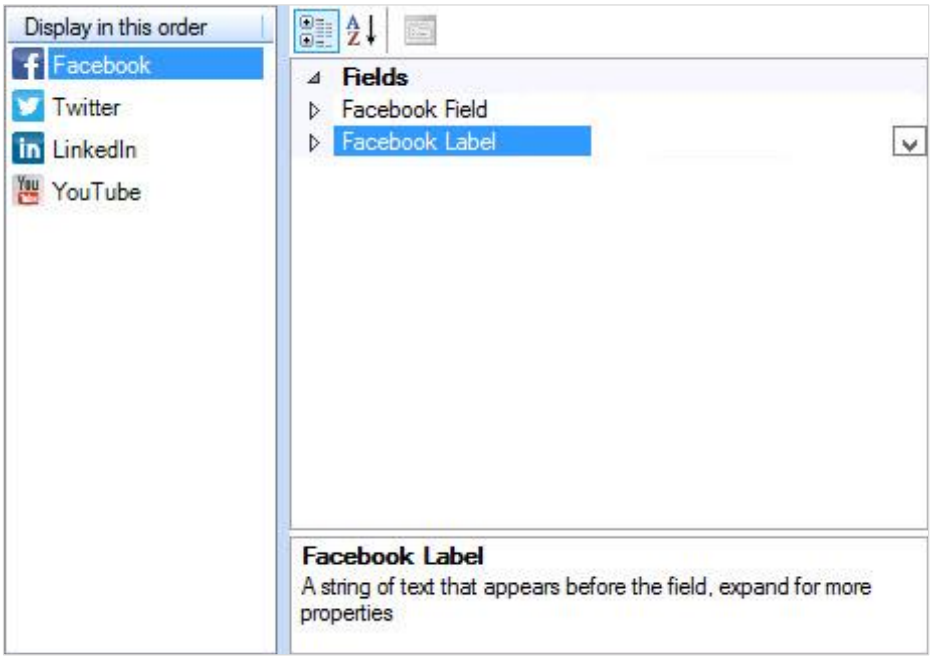
A list of common social media items is displayed in the available icons pane, on the left-hand side of the social media strip window. To add one of these items to your social media strip, simply select it from this list and click the add button:

The selected item is added to the end of the social media strip, shown in the center pane. The item is added with an icon and generic properties which you then need to personalize [pg.254] with your own details. If required, you can also choose to reorganize items [pg.259] in this pane to change the sequence of the completed social media strip.

Personalizing a Social Media Item

When a social media item is added from the available icons list, it is added with an icon and generic properties. For example, when the Facebook item is added, the default hyperlink associated with the icon is http://www.facebook.com, therefore you will need to update this with the link to your own Facebook page.

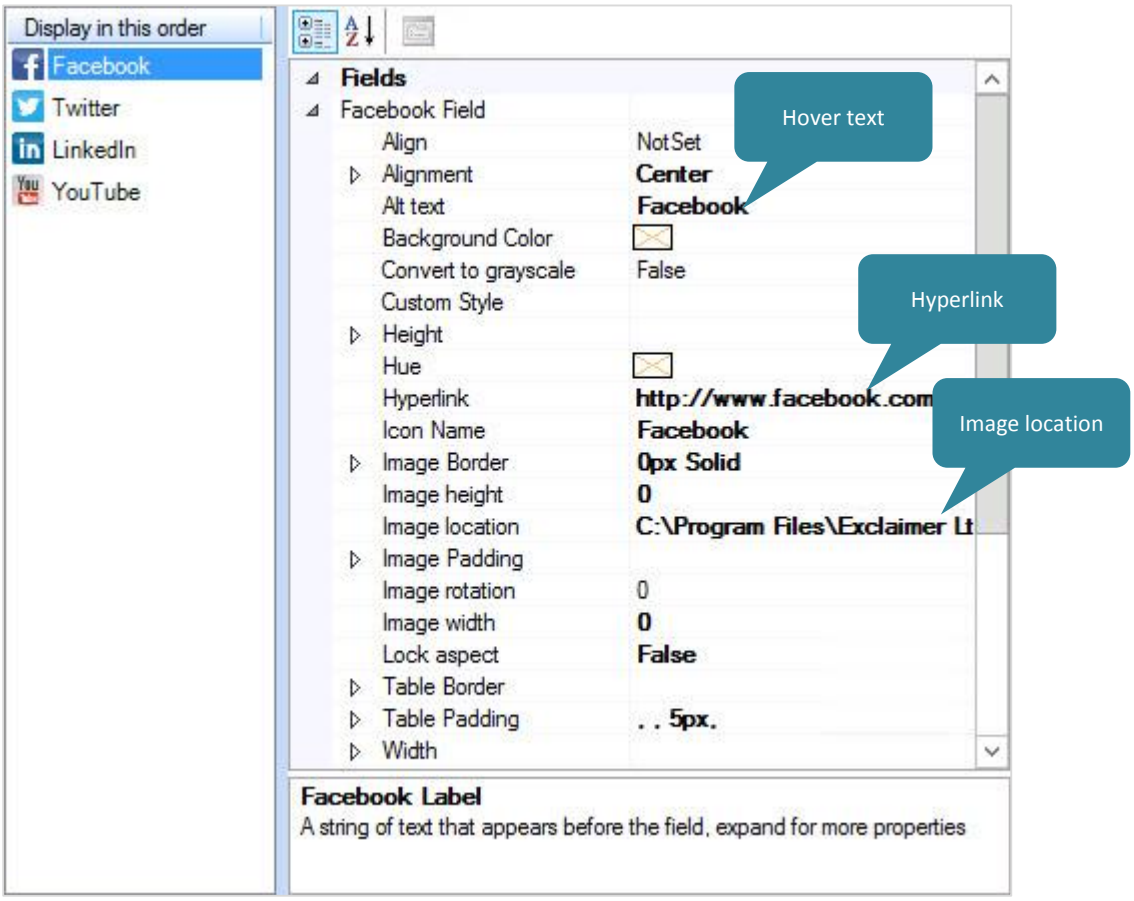
Properties for each item are listed within two main categories - field and label:



Field properties [pg.255] are concerned with the behavior and appearance of the item - for example, what image is used for the icon, what hyperlink is used when the recipient clicks on the icon, etc. Label properties [pg.256] can be used if you wish to add some text to be displayed with an icon in the strip.

Field Properties

When an item is added to the social media strip, a range of field properties is available however, there are a number of key properties that should be checked and updated as required. These items are shown below:



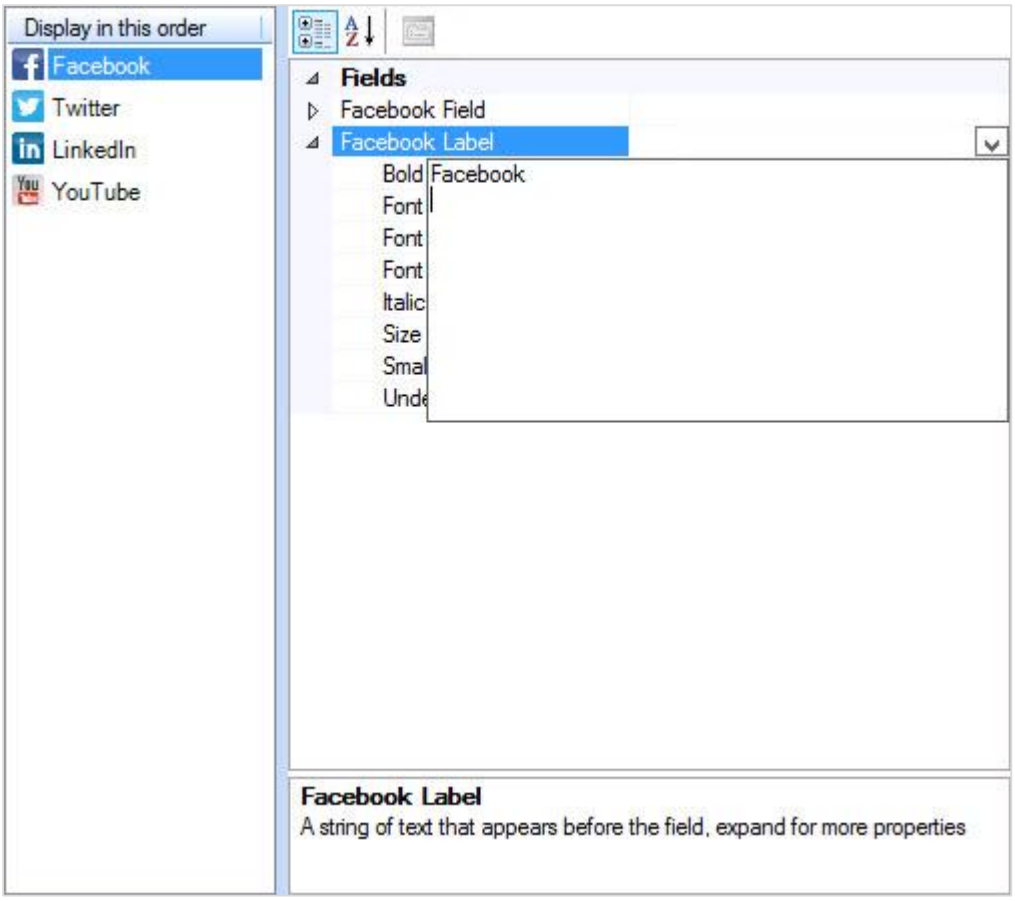
Here:

- The alt text property contains text that will be displayed when a message recipient hovers their cursor over the icon for that item. Default text is provided but you may wish to change this to something more personal (for example, 'Visit us on Facebook!').
- The hyperlink property contains a link to the main site for the social media item - for example, http://www.facebook.com. You should update this link to reflect your own feed/page - for example, http://www.facebook.com/pages/Exclaimer/148766371817678.
- The image location property shows where the icon for the social media item is stored. If you are happy to use the default icon then there is no need to change this however, if you wish to use an alternative icon, you should change this property accordingly.

Label Properties

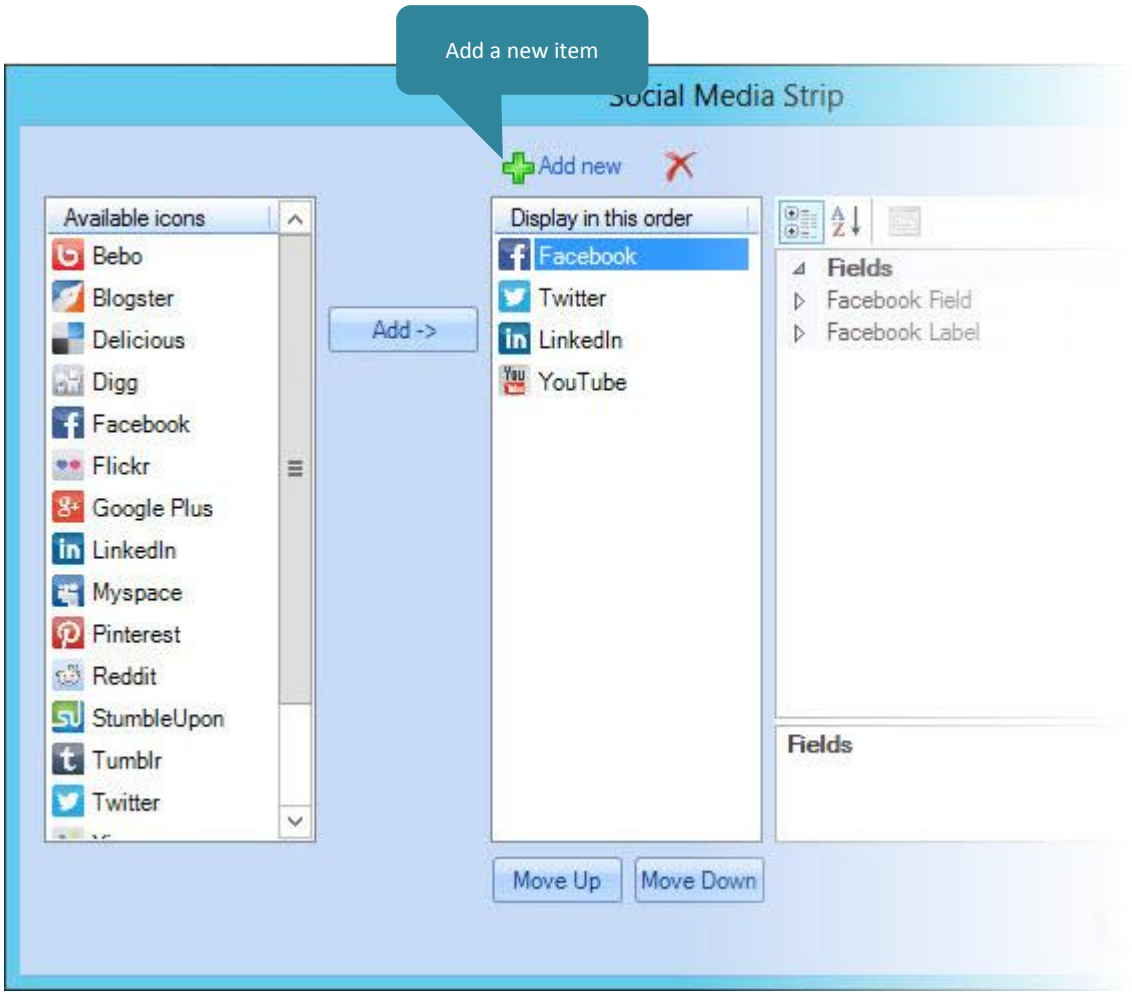
Label properties can be used if you wish to add text to a social media item - for example:

To do this, click anywhere within the topmost label field to activate it and then click the associated down-arrow to open the text box and add required text:

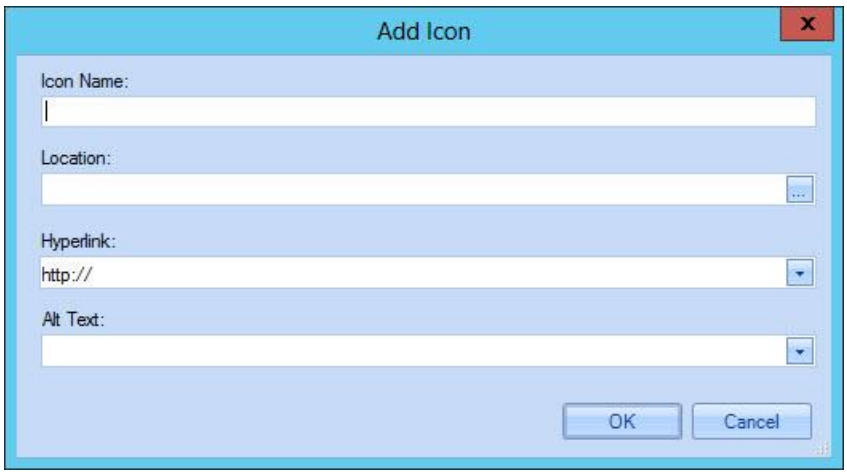


Adding a New Item to the Social Media Strip

If you need to add a social media item which is not shown in the available icons list, click the add new option at the top of the social media strip window:



From here, the add icon window is displayed:

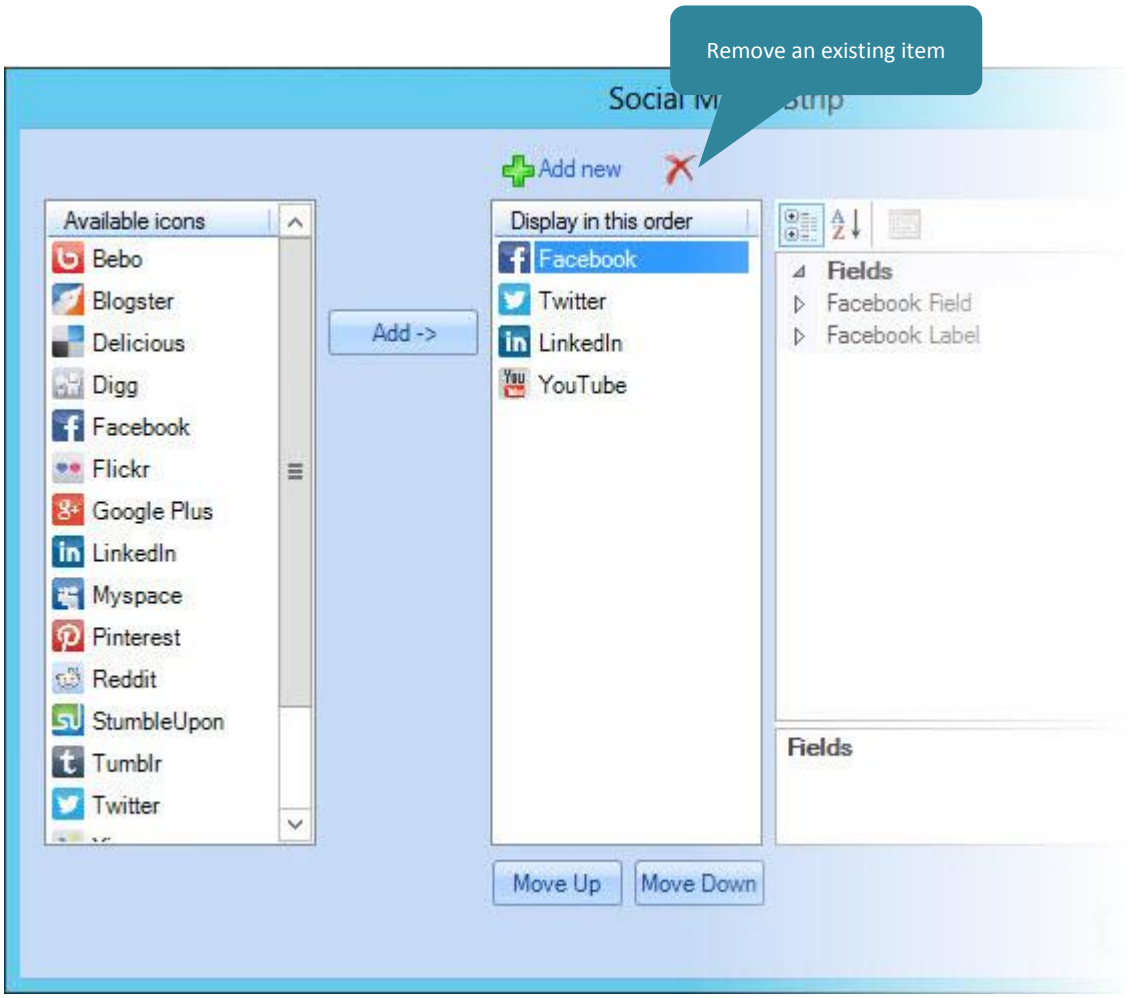


Complete details for this item using the table below as a guide:

Toolbar option	Summary
Icon Name	Enter a name for this item. This name is used to identify this item in the available icons list.
Location	Click the browse button associated with this field to navigate drives and folders to locate the required image.
Hyperlink	Enter the full URL associated with this item - for example, http://www.facebook.com/pages/Exclaimer/148766371817678.
Alt Text	Enter text to be displayed when a message recipient hovers their cursor over the icon for this item - for example, 'Visit us on Facebook!'.

Removing an Item from the Social Media Strip

To remove an item from the social media strip, simply select the required item (in the center pane) and click the cross icon at the top of the social media strip window:

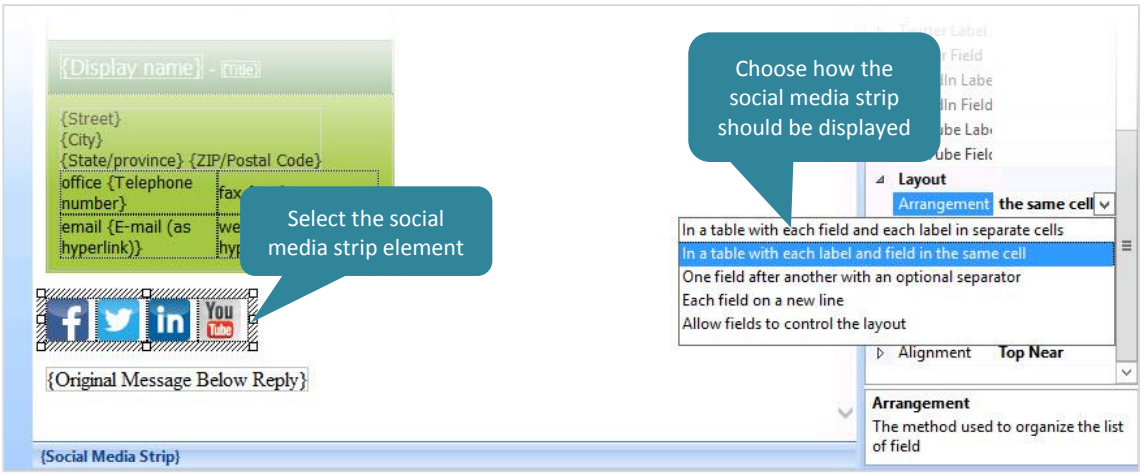


Re-Organizing the Social Media Strip

Social media items are displayed in the sequence that they appear within the center pane of the social media strip window. To change this sequence, select an item and use move up/ move down buttons to shift its position in the list.

Customizing the Social Media Strip

Once a social media strip has been added to a template, you can define properties for the strip as a whole. For example, you can define a border, background color and layout. To do this, select the social media strip and access the properties panel:


{Display name} - {Title}
{Street}
{City}
{State/province} {ZIP/Postal Code}
office {Telephone number}
email {E-mail (as hyperlink)}
Select the social media strip element
{Original Message Below Reply}
{Social Media Strip}
Choose how the social media strip should be displayed
Layout
Arrangement the same cell
In a table with each field and each label in separate cells
In a table with each label and field in the same cell
One field after another with an optional separator
Each field on a new line
Allow fields to control the layout
Alignment Top Near
Arrangement
The method used to organize the list of field

List of Fields

The list of fields field is used to choose a number of fields to be added [pg.260], together with associated labels.

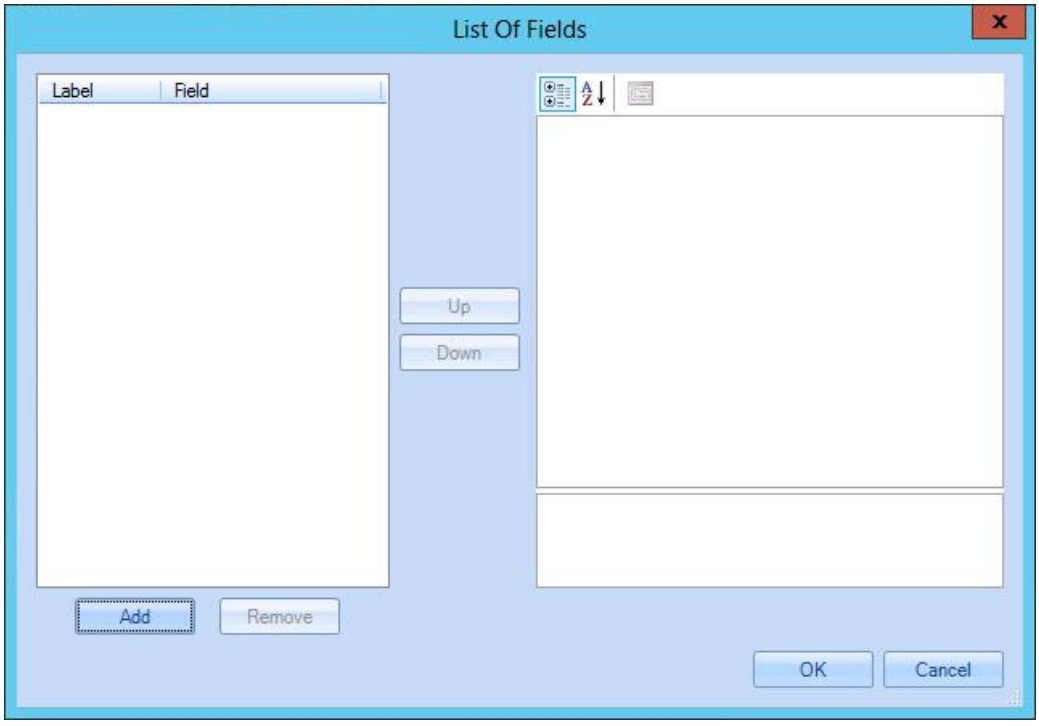
Having added a list of fields, you can specify font properties for all labels [pg.263], so there is no need to format each label individually unless you have a particular need for doing so. You can also choose how the fields and labels should be displayed [pg.264] - for example, you might choose to use a tabular layout or as a single line with a given separator.

The example below shows an extract from a template in both design and preview modes. Here, a list of fields element has been added to insert three fields with associated labels, displayed as a single line with a separator:

Design Mode	Preview Mode

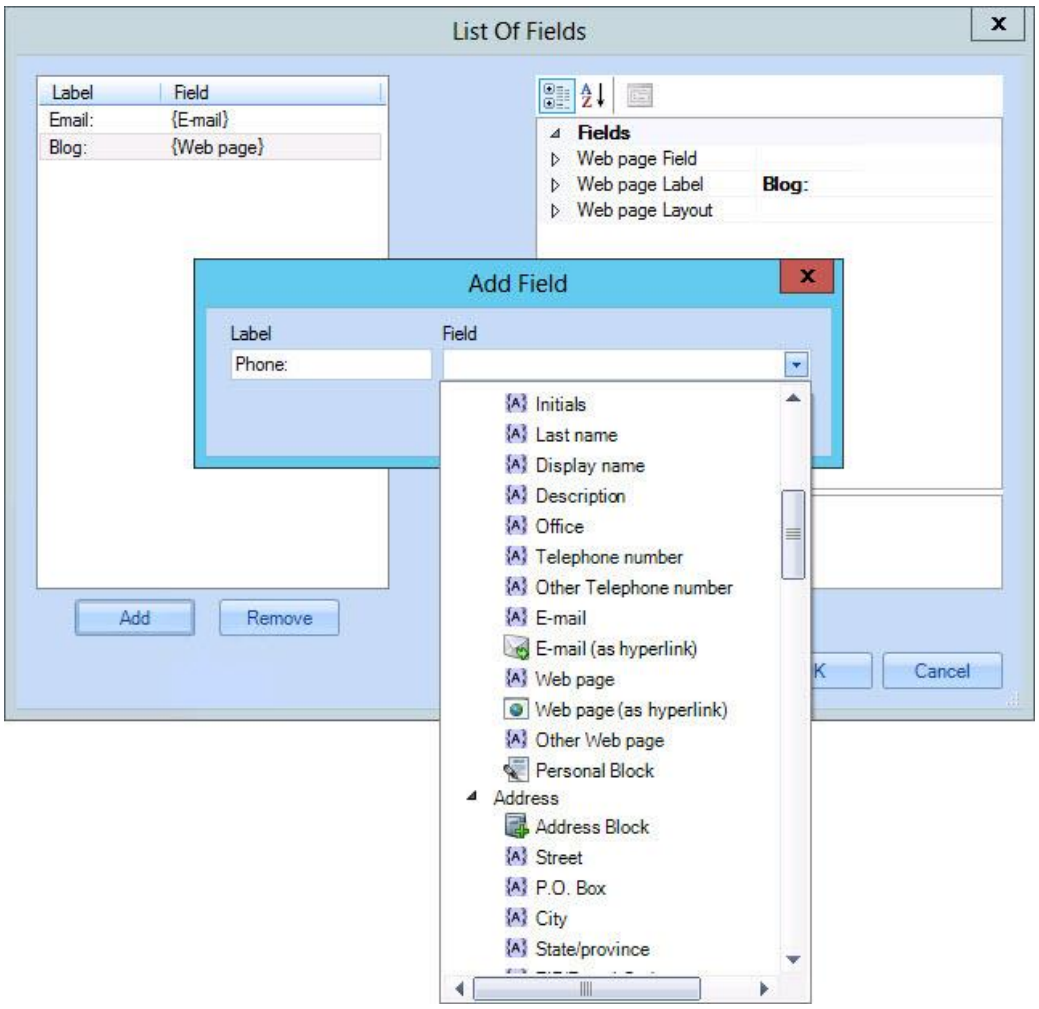
Adding a List of Fields

1. To add a list of fields, use the fields panel to insert a list of fields field. When this field is added to a template, the list of fields window is displayed:

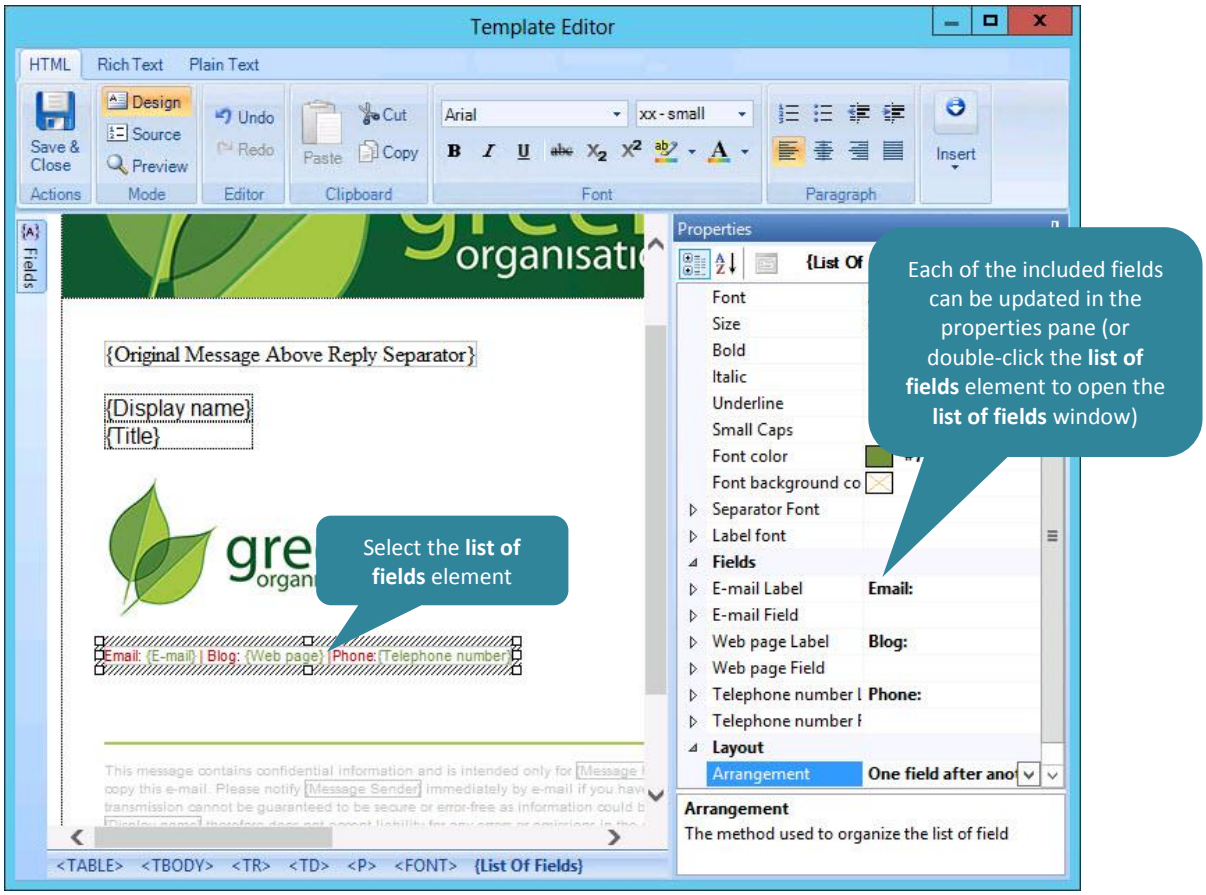


2. Click the add button to add the first required field. The add field window is displayed:

3. Enter a label for the field and use the arrow associated with field to choose the required field:

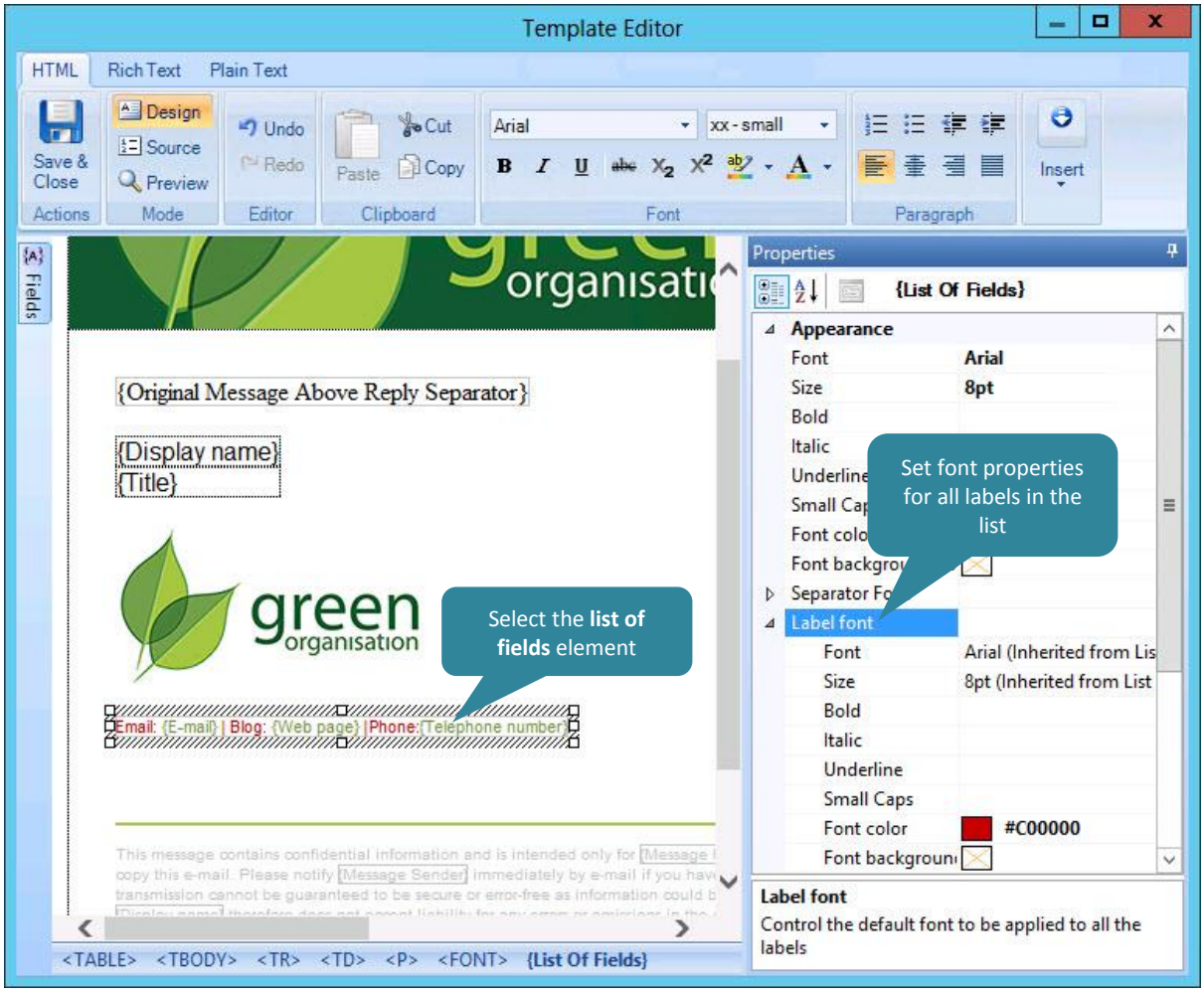


4. Add as many fields as required in this way and then click OK to return to the template editor, where the list of fields element is added to the template:



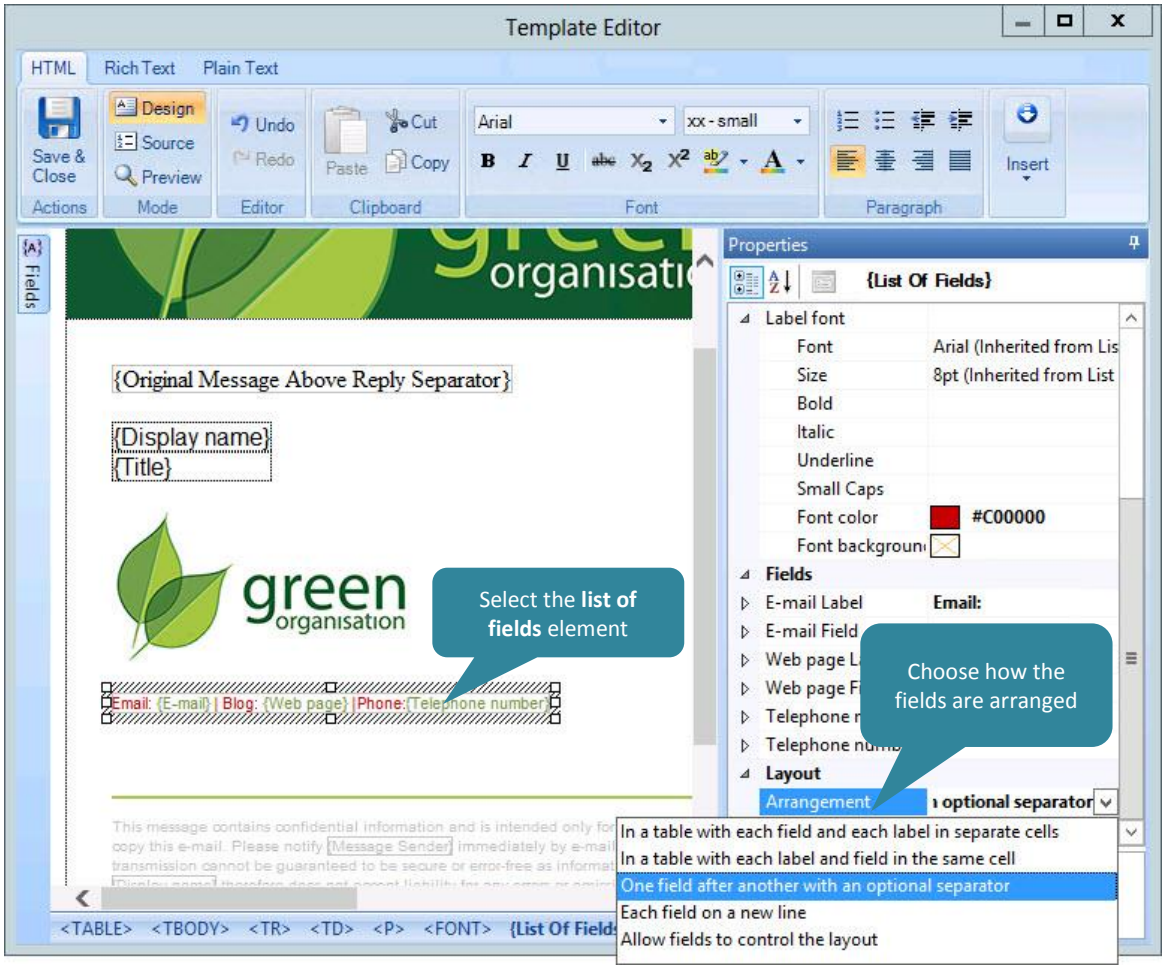
Changing the Appearance of All Field Labels

To quickly change the appearance of all labels in a list of fields, simply select the list of fields element and update font settings within the label font section of the properties pane:



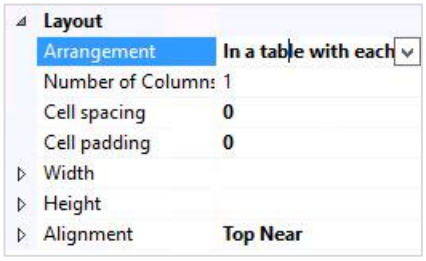
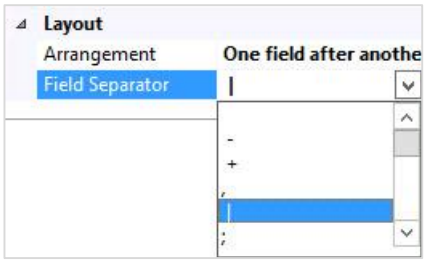
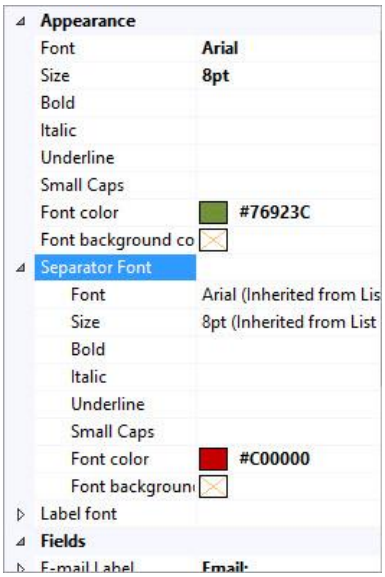
Choosing How a List of Fields Is Arranged

By default, a list of fields is presented in tabular form, with labels in the left-hand column and fields on the right. If required, you can change the arrangement using layout > arrangement settings in the properties pane:



Available options are summarized below:

Action	Summary
In a table with each field and each label in separate cells	This is the default setting with field labels in the left-hand column and fields on the right: Email: kareng@greenorg.net Blog: www.greenorg.net Phone:+44 (0) 1252 987 456 With this option, additional properties are available so you can also specify how the table should be displayed: Layout Arrangement: In a table with eacl Number of Column: 2 Cell spacing: 0 Cell padding: 0 Width Height Alignment: Top Near .../continued

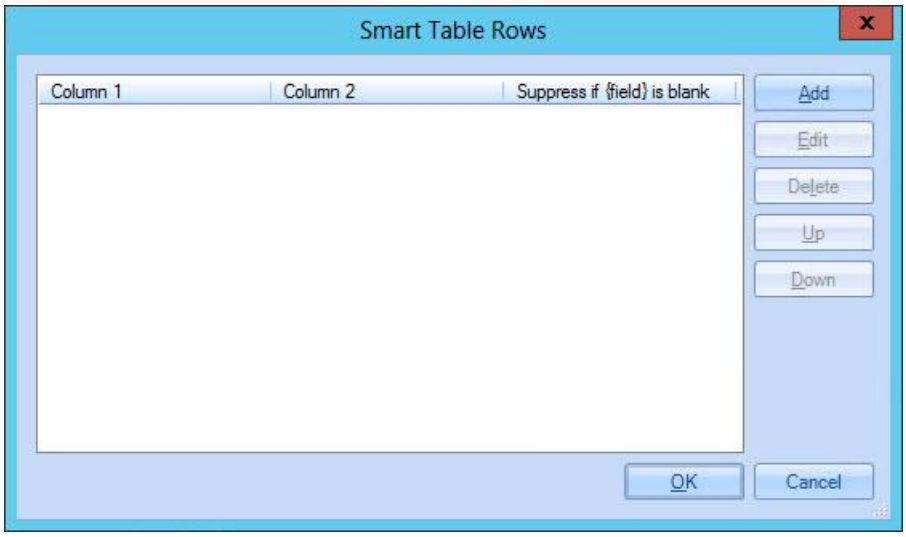
Action	Summary
In a table with each label and field in the same cell	Arranges the label and field in the same cell: With this option, additional properties are available so you can also specify how the table should be displayed: 
One field after another with an optional separator	With this option, each label and field is arranged in a continuous line, optionally delimited by a separator: The separator is defined using the field separator property, which is available when this option is selected:  Having added a separator, you can apply formatting for your chosen character using separator font properties:  .../continued

Action	Summary
Each field on a new line	Use this option to display each label and field together on a new line:
Allow fields to control the layout	Select this option to accept the most appropriate layout as determined by fields you have selected for inclusion:

Smart Tables

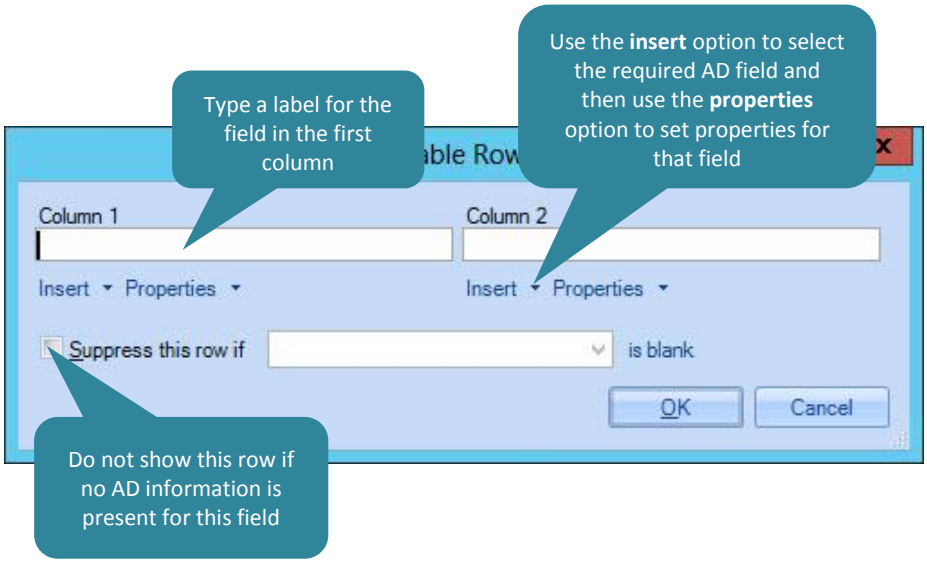
The custom smart tables field can be used to insert a table and specify content / attributes using straightforward data entry fields. This is a quick and easy way to insert a table and include Active Directory fields (or other content) at the same time; the alternative would be to insert a standard HTML table [pg.212] and add fields or other content manually.

Having selected the custom smart tables field, the smart table rows window is displayed:

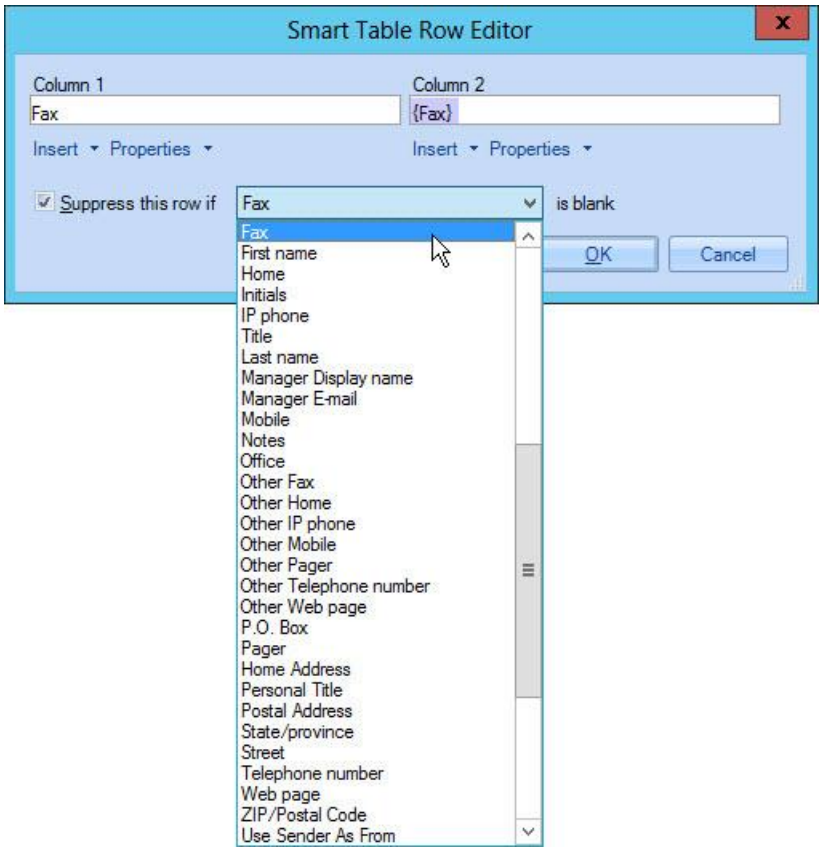


By default, a two column table is added. If you need a smart table with more (or fewer) columns you can continue with the setup for two columns and adjust the number of columns after the table is inserted, or you may prefer to cancel this operation and use the table [pg.212] option from the HTML toolbar (since this option allows you to specify the required number of rows and columns at the outset).

From here, click add to start adding rows to the table. The smart table row editor allows you to define content for each column in the row - you can add text or fields, as required. If you are adding a field, you can choose to suppress this row if no Active Directory information is found for the field when the signature is processed:


Type a label for the field in the first column
Use the **insert** option to select the required AD field and then use the **properties** option to set properties for that field
Column 1
Column 2
Insert
Properties
Insert
Properties
Suppress this row if
is blank
OK
Cancel
Do not show this row if no AD information is present for this field

If required, you can choose to not show a table row if no Active Directory information is found for a specified field - for example:



Continue to add as many rows as needed. If required, you can select a row and use up / down options to adjust the sequence. You can also edit and delete existing rows. Once all rows have been added, click OK to insert the table into the template.

Updating an Existing Smart Table

To update an existing smart table in a template, simply select and double-click the table. Alternatively, select the entire table and expand the misc section in the properties pane. From here, select the browse - ... - button to the right of the rows entry. The smart table rows window is displayed so you can add, edit or remove rows as required.

Server Fields

Fields in the server fields section are summarized below:

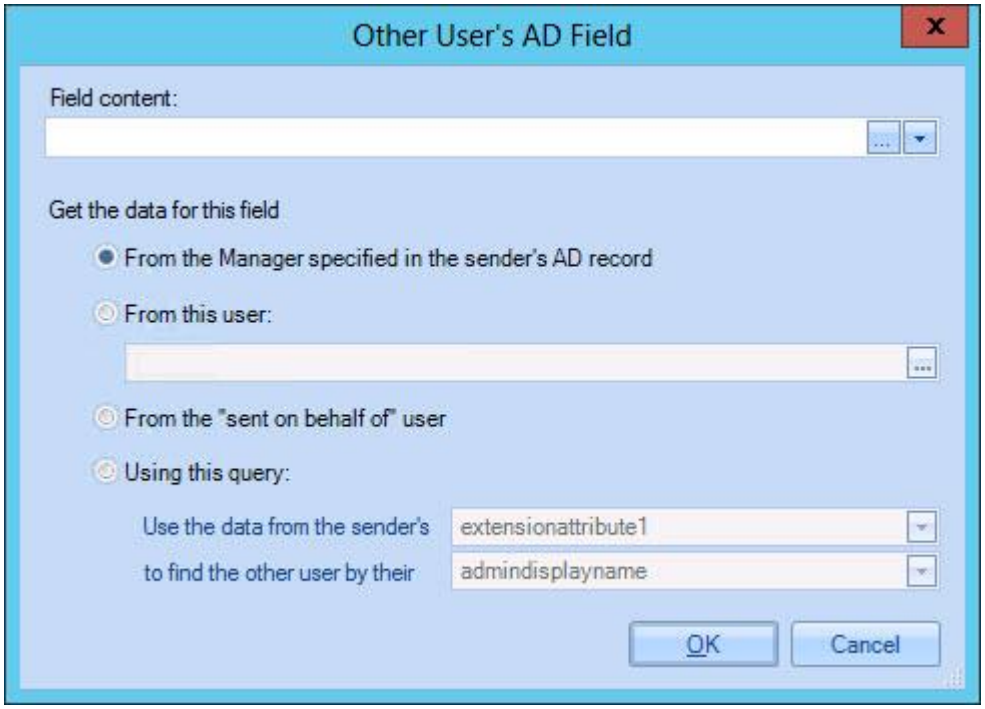
Field	Inserts...
Server Distinguished Name	Distinguished name information for the mail server (for example: CN=HELPDC,OU=Domain Controllers,DC=network26,DC=local)
Server IP Address	IP address details for the mail server (for example: fe80::e5ce:af42:688c:d2d8%10 192.168.26.1)
Server Locale	Locale information for the mail server (for example: en-US)
Server NETBIOS Name	The NETBIOS name for the mail server (for example: HelpDC)
Server Qualified Domain	Qualified domain information for the mail server (for example: HelpDC.network26.local)

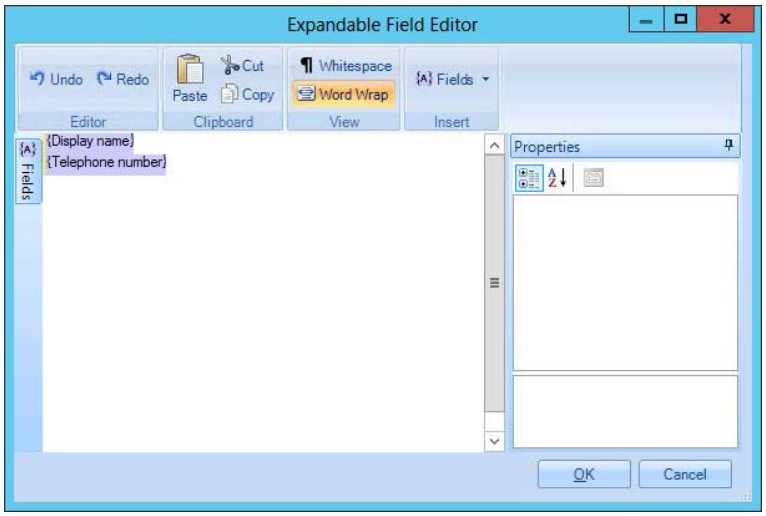
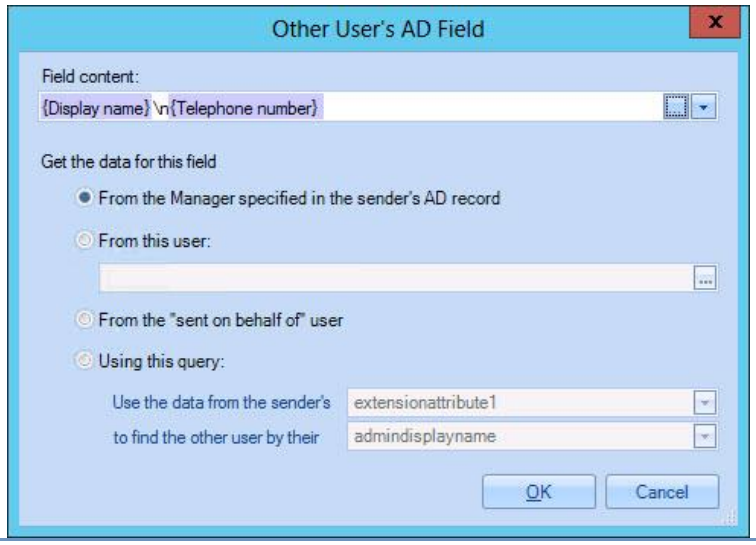
NOTE

For fields that contain multiple values (for example, **Server IP Address**), each value will be shown on a new line by default.

Advanced Fields

Fields in the advanced fields section are summarized below:

Field	Inserts...
Conditional field	Set conditions under which Active Directory information will or will not be included. For further information please refer to conditional field [pg.272].
Other User's AD field	Add Active Directory information for another (specified) user. Once this field is added, the other user's AD field window is displayed so you can choose what Active Directory information to include and for whom:  Here, you can select Active Directory details to be included for another user (i.e. a user who is not actually sending the message). You can include details for: • The message sender's manager (as identified from the content of the sender's manager display name field in the Active Directory) • A specified user from the Active Directory (click the browse [...] button to select the required user) • The person who has delegated another user to send email messages on their behalf (please refer to the fields > message sent on behalf [pg.219] section for an explanation of the sent on behalf scenario) • The user matched for a query defined using exchange advanced [pg.230] fields .../continued

Field	Inserts...
	Using field content options (at the top of this window) you can choose to include information from a single Active Directory field, or multiple fields. For a single field, select the down arrow and make your selection: For multiple fields, click the [...] button to open the expandable field editor and then select all required fields:  Click OK to confirm your selections and exit back to the updated other user's AD field window - for example: 

Conditional Field Examples

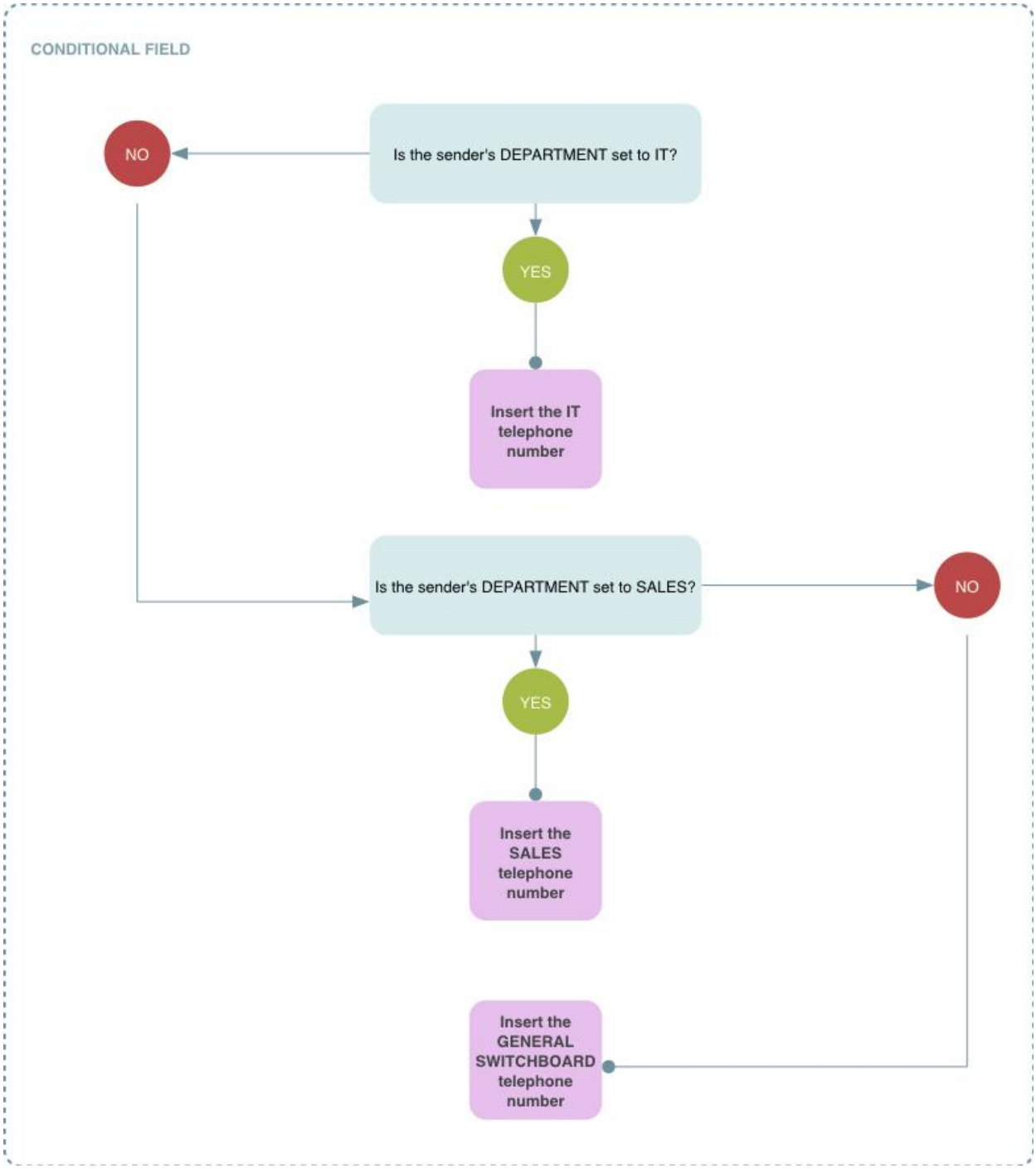
The conditional field allows you to set conditions under which defined signature content will or will not be included. Often, you can achieve the same results by creating different signature templates [pg.183] and associated signature policies [pg.64] however, the conditional field allows you to specify and control content variations **within a single template**.

For large organizations dealing with complex signature variations, this can be a great advantage since it allows you to minimize the number of templates and associated policies required and yet still specify highly detailed conditional content. To help you gain an understanding of how the conditional field can be used, the three sample scenarios and detailed instructions are available:

- Conditional Field Example 1 [pg.273] - shows a conditional field being used to apply different signature content for users within two given departments, and a generic signature for everyone else
- Conditional Field Example 2 [pg.282] - shows a conditional field being used to apply different signature content (including an image) for users in France and Germany, and a generic signature for everyone else
- Conditional Field Example 3 (Advanced) [pg.291] - shows advanced use of the conditional field being used to apply different signature content incorporating nested conditional fields (i.e. one conditional field within another conditional field)

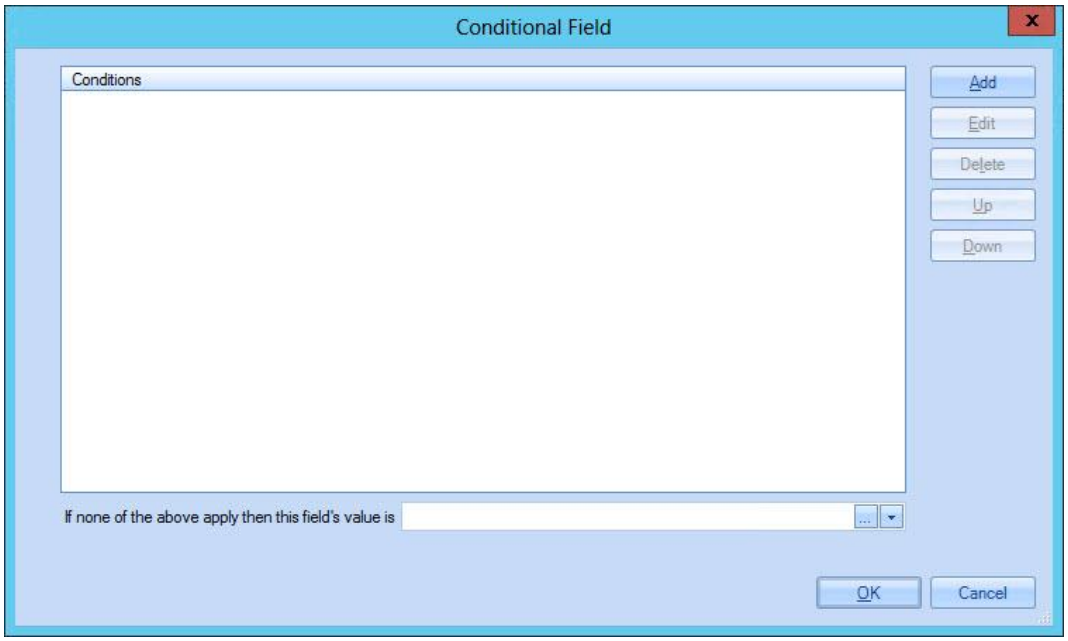
Conditional Field Example 1

This example shows a conditional field being used to apply different signature content for users within two given departments, and a generic signature for everyone else. The scenario for this example is illustrated below:

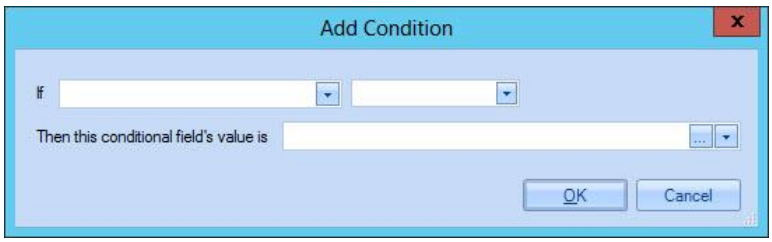


To achieve this scenario using Exclaimer Signature Manager Exchange Edition, follow the steps below:

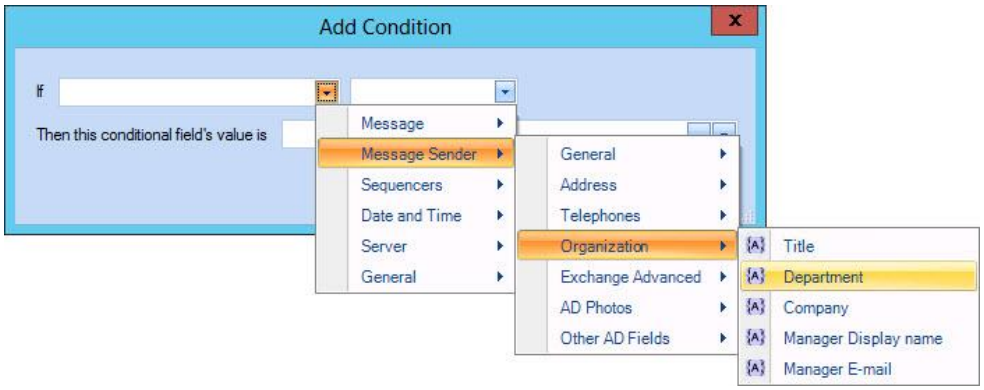
1. Edit [pg.193] or create [pg.185] the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the fields panel, insert a conditional field (listed in the advanced section). The conditional field window is displayed:



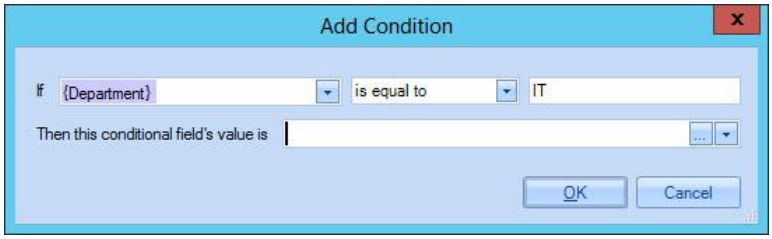
4. Click the add button to enter the first condition (i.e. to add signature content and associated rules for the IT department). The add condition window is displayed:



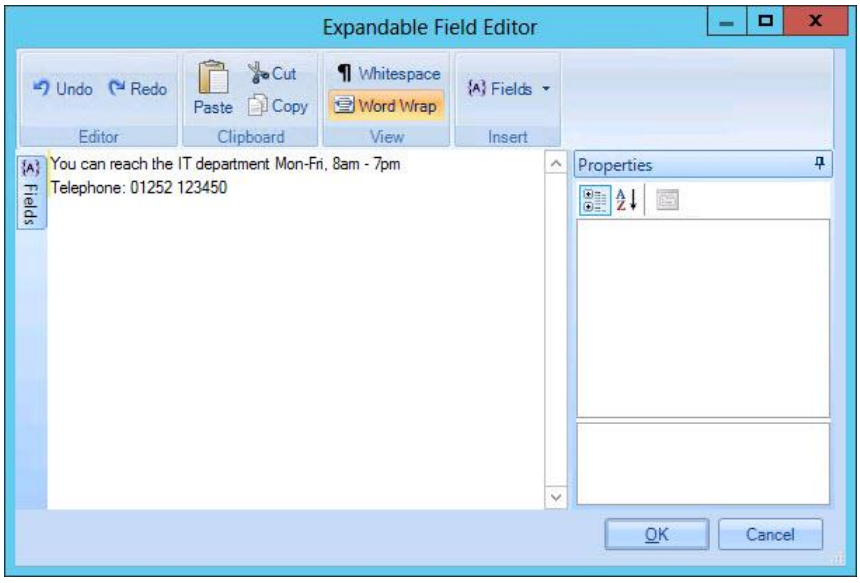
5. Using the drop-down lists associated with the if field, navigate to select message sender > organization > department field:



6. Leave the qualifier as the default is equal to and type IT into the associated value field:



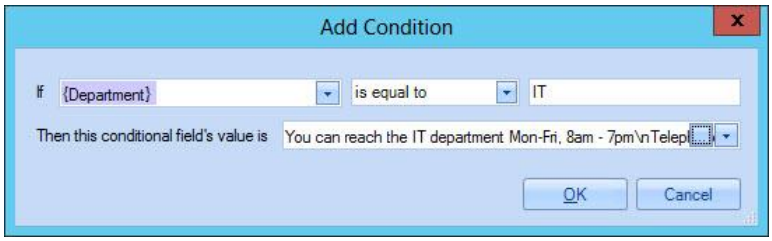
7. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by the IT department). You can enter text and/or fields as required:



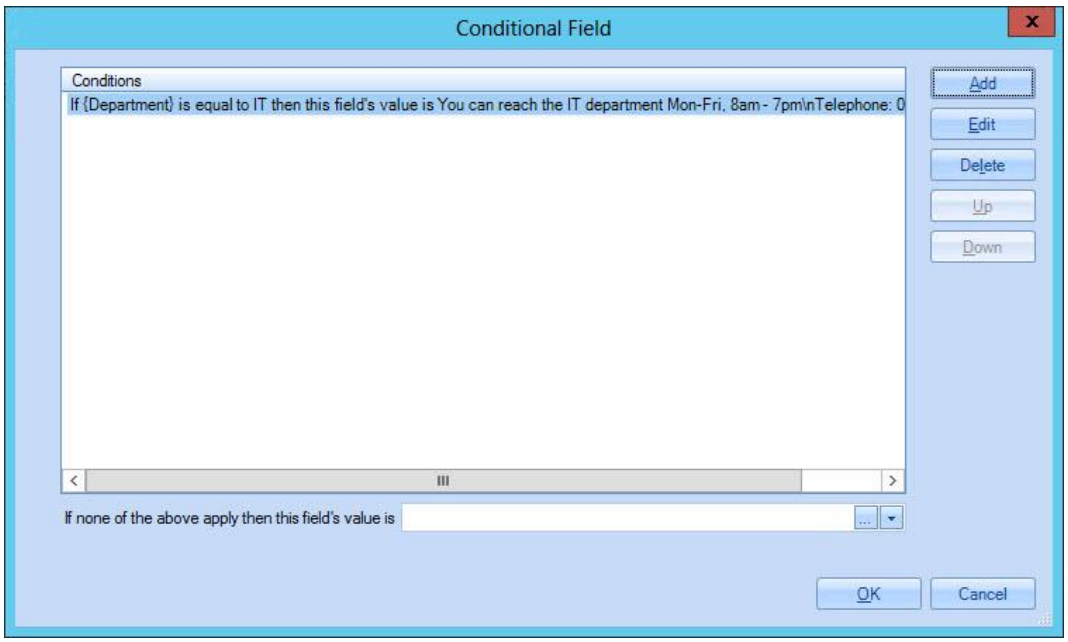
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 20 [pg.280] for details about changing these properties.

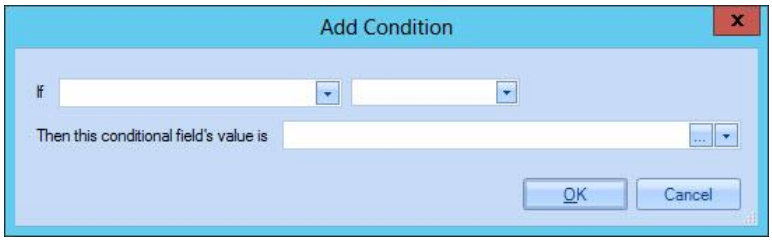
8. Click OK to save changes and exit back to the add condition window, where your first condition is now displayed:



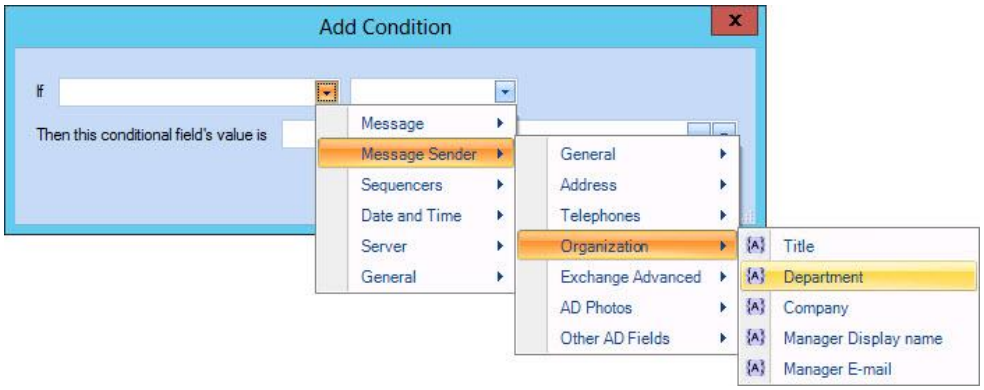
9. Click OK to exit back to the conditional field window:



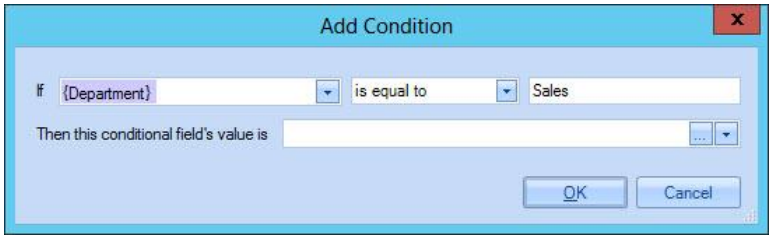
10. Click the add button to enter the second condition (i.e. to add signature content and associated rules for the Sales department). The add condition window is displayed:



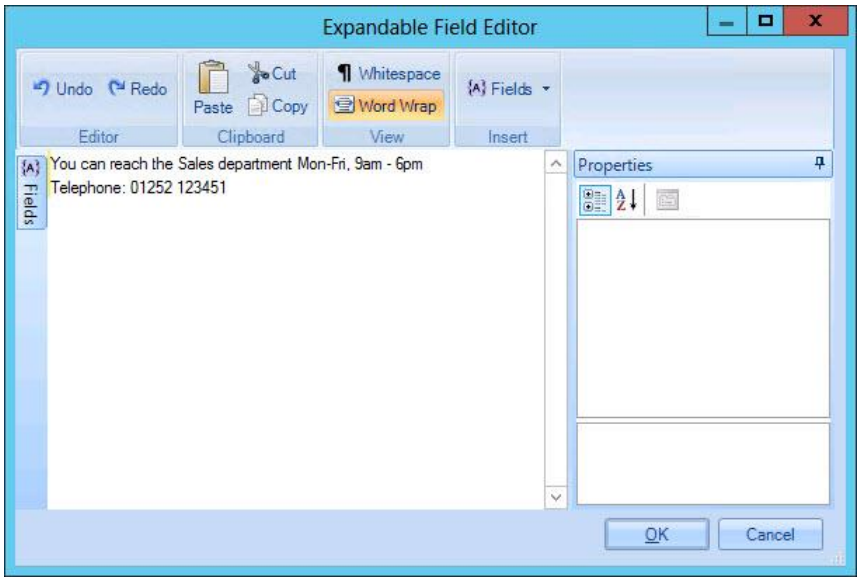
11. Using the drop-down lists associated with the if field, navigate to select message sender > organization > department field:



12. Leave the qualifier as the default is equal to and type Sales into the associated value field:



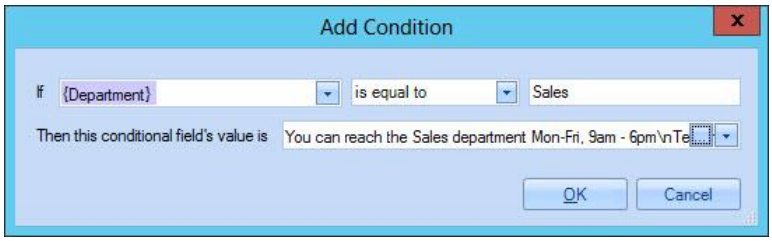
13. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by the Sales department). You can enter text and/or fields as required:



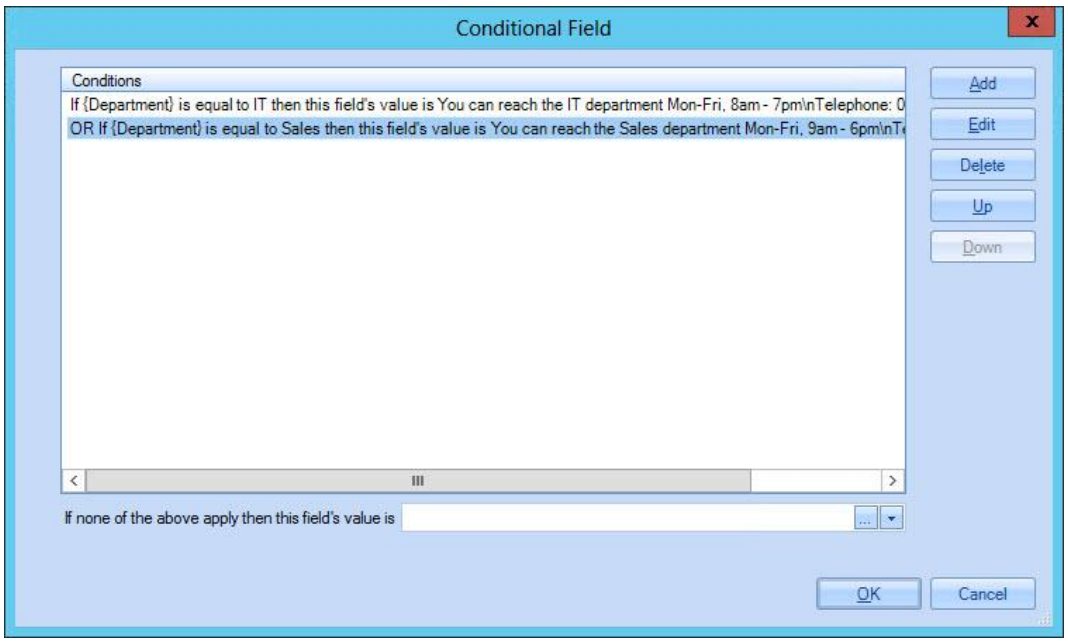
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 20 [pg.280] for details about changing these properties.

14. Click OK to save changes and exit back to the add condition window, where your second condition is now displayed:

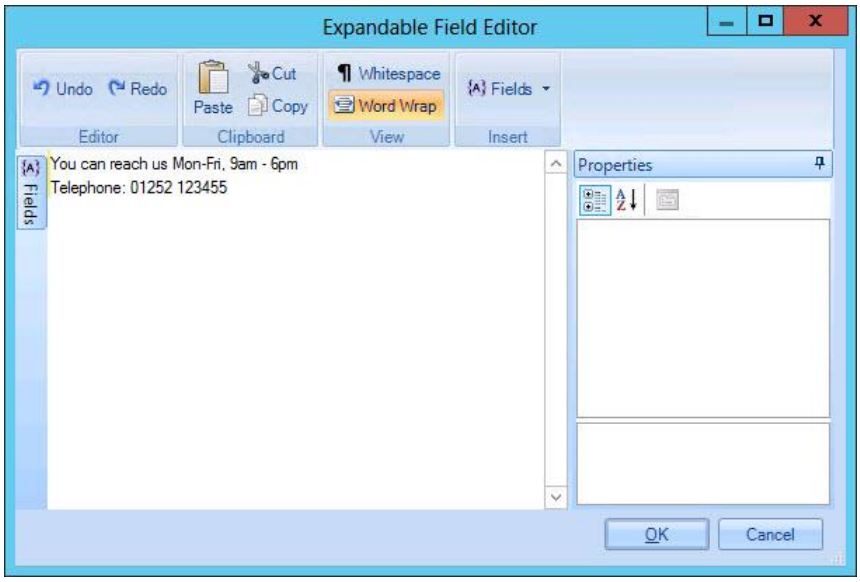


15. Click OK to exit back to the conditional field window where both conditions are now displayed:


Conditional Field
Conditions
If {Department} is equal to IT then this field's value is You can reach the IT department Mon-Fri, 8am - 7pm\nTelephone: 0
OR If {Department} is equal to Sales then this field's value is You can reach the Sales department Mon-Fri, 9am - 6pm\nT
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
OK
Cancel

16. To define signature content that should be applied for everyone else (i.e. people who are not in either the IT or Sales departments), move to the bottom of this window and click the [...] button associated with the if none of the above apply then this field's value is field. The expandable field editor window is displayed.

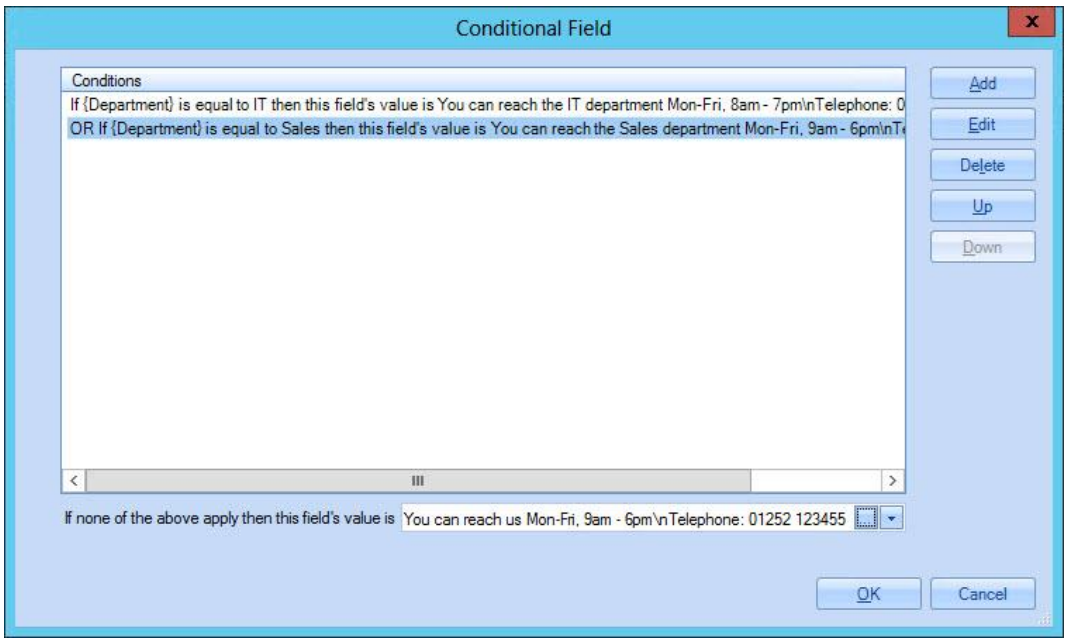
17. Use this window to enter content to be used if neither of the specified conditions are met (i.e. for messages sent by non IT/Sales users). You can enter text and/or fields as required:



NOTE

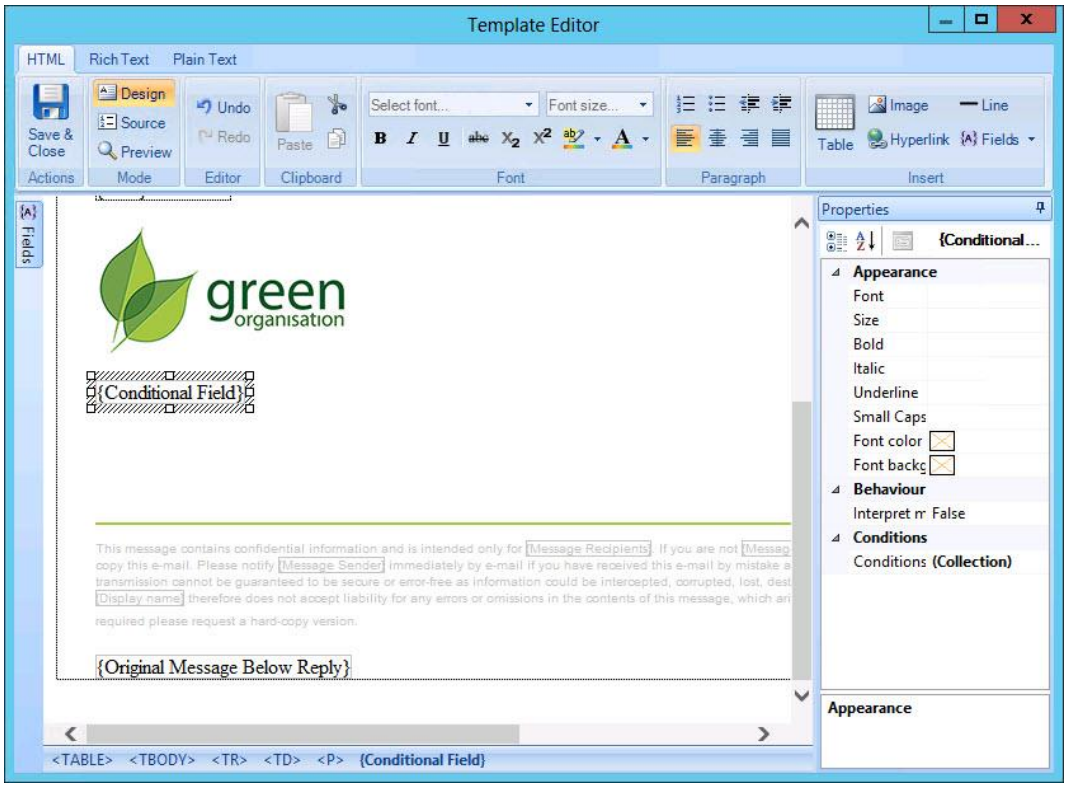
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 20 [pg.280] for details about changing these properties.

18. Click OK to save changes and exit back to the conditional field window:

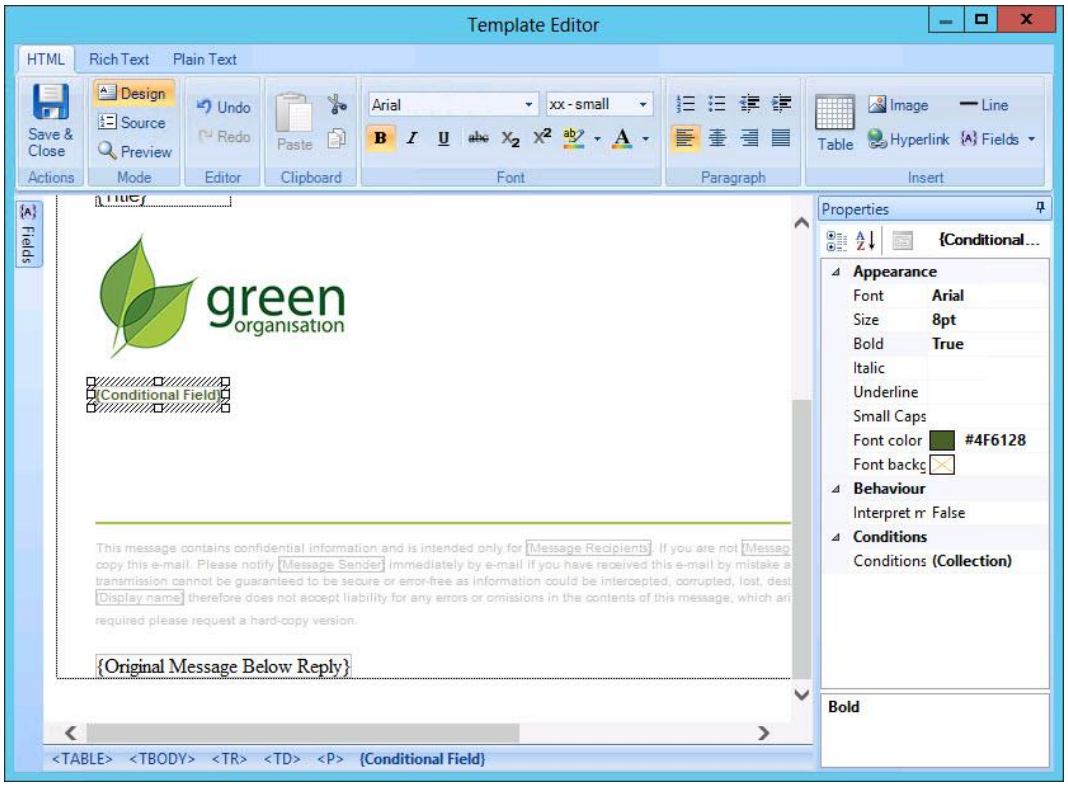

Conditional Field
Conditions
If {Department} is equal to IT then this field's value is You can reach the IT department Mon-Fri, 8am - 7pm\nTelephone: 0
OR If {Department} is equal to Sales then this field's value is You can reach the Sales department Mon-Fri, 9am - 6pm\nT
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
You can reach us Mon-Fri, 9am - 6pm\nTelephone: 01252 123455
OK
Cancel

Settings for the conditional field are now complete, with two conditions (one for IT users and one for Sales users) and then required content for everyone else.

19. Click OK to exit back to the template editor, where the conditional field is now shown:



20. Select this field and use appearance settings in the properties pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used:



In preview mode for an IT user, this example is displayed as follows (notice that the text has the same font settings as those defined for the conditional field element above):

21. Save the template in the normal way. The template can now be associated with a signature policy [pg.64], where the only condition [pg.90] required is all messages (although you can apply further conditions at policy level, if necessary).

NOTE

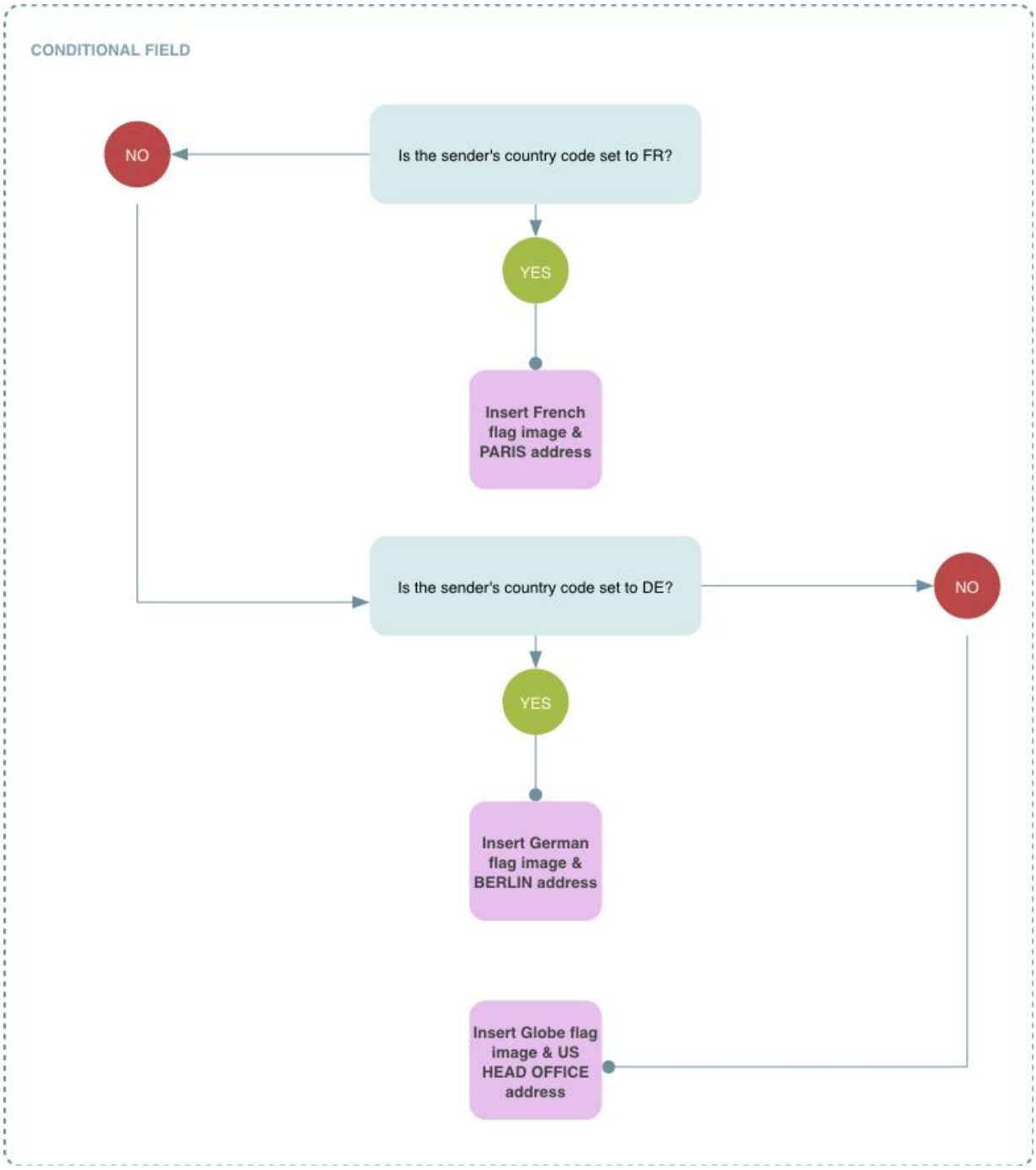
Using nested conditional fields (i.e. adding one **conditional field** within another **conditional field**) can be a particularly powerful approach for advanced users who need to create complex signatures to cater for a wide range of scenarios within an organization. For further information, please refer to the conditional field example 3 (advanced) [pg.291] section.

Conditional Field Example 2

This example shows a conditional field being used to apply different signature content for users in:

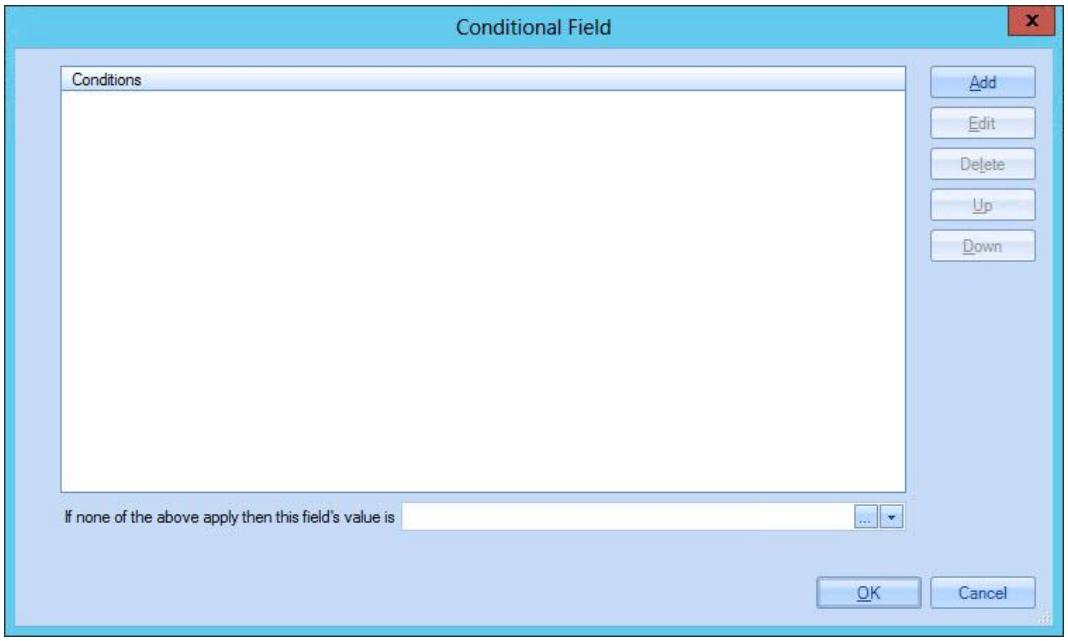
- France (add a French flag image and a Paris address)
- Germany (add a German flag image and a Berlin address)
- Everyone else (add a globe image and a US address)

In this example, conditional content is added in the form of text and a custom image. The scenario for this example is illustrated below:

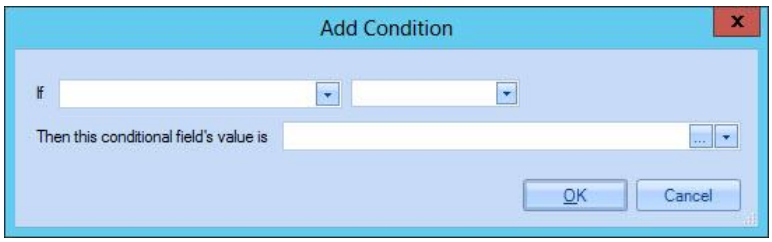

CONDITIONAL FIELD
NO
Is the sender's country code set to FR?
YES
Insert French flag image & PARIS address
Is the sender's country code set to DE?
NO
YES
Insert German flag image & BERLIN address
Insert Globe flag image & US HEAD OFFICE address

To achieve this scenario using Exclaimer Signature Manager Exchange Edition, follow the steps below:

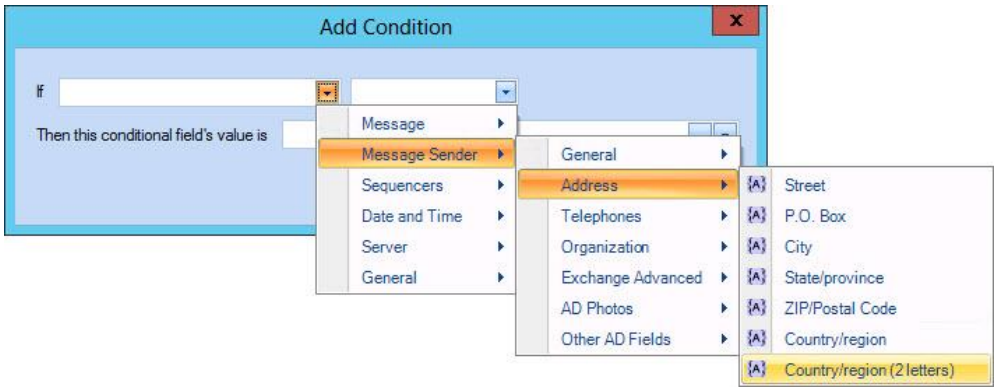
1. Edit [pg.193] or create [pg.185] the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the fields panel, insert a conditional field (listed in the advanced section). The conditional field window is displayed:



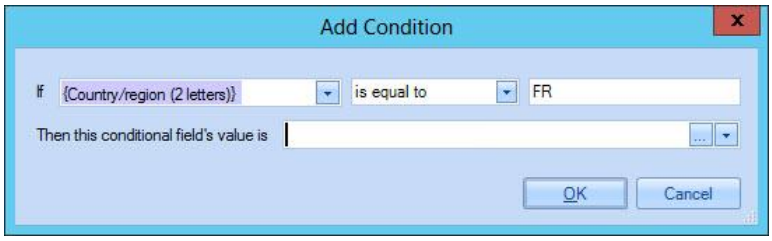
4. Click the add button to enter the first condition (i.e. to add signature content and associated rules for French users). The add condition window is displayed:



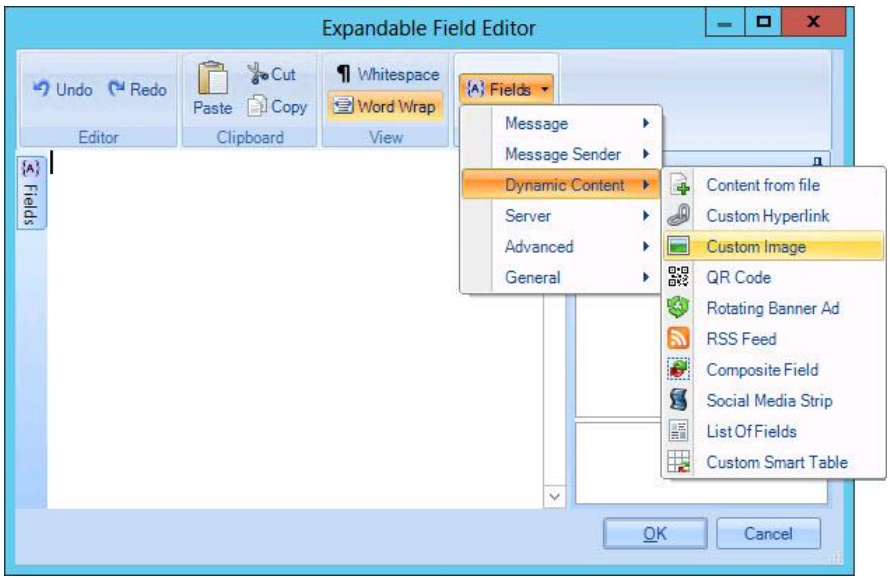
5. Using the drop-down lists associated with the if field, navigate to select message sender > address > country/region (2 letters) field:



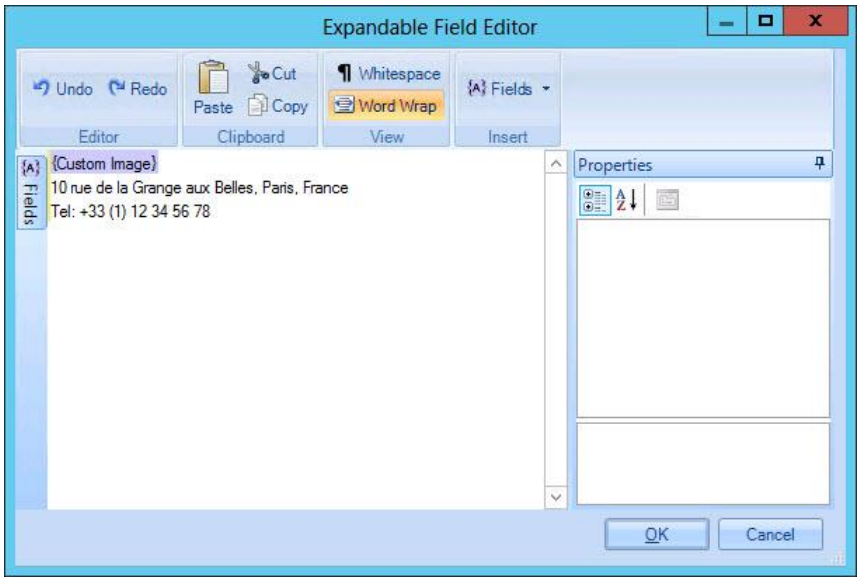
6. Leave the qualifier as the default is equal to and type FR into the associated value field:



7. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by French users). You can enter text and/or fields as required - to enter an image of a French flag, the custom image field can be used:



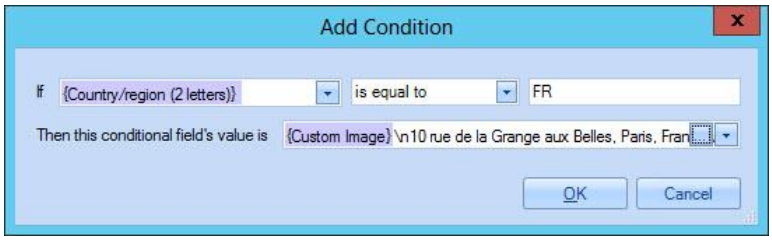
Select the required custom image [pg.235] in the normal way and add Paris address details as text (alternatively, you could use Active Directory address fields if applicable):



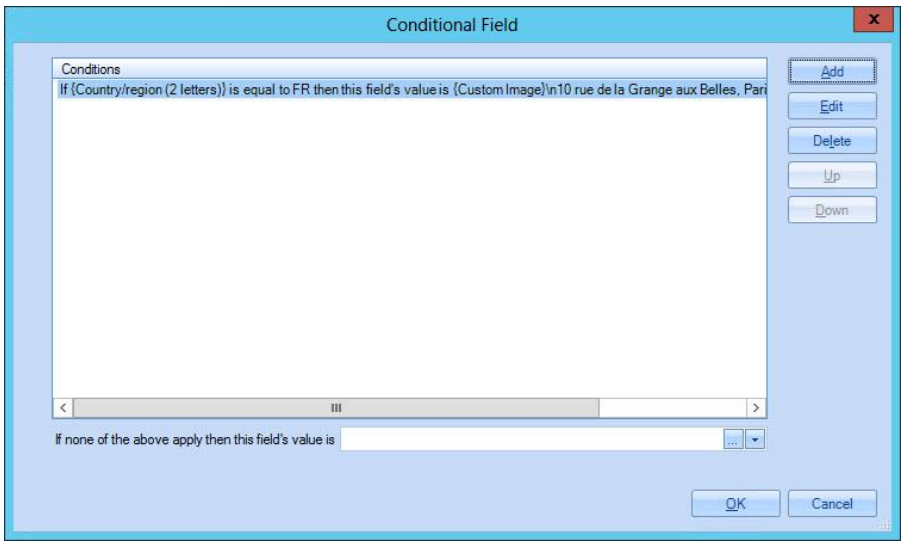
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 20 [pg.290] for details about changing these properties.

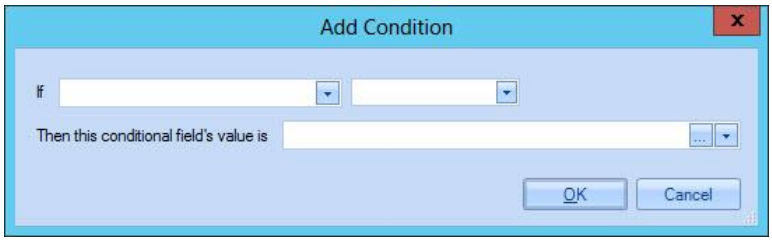
8. Click OK to save changes and exit back to the add condition window, where your first condition is now displayed:



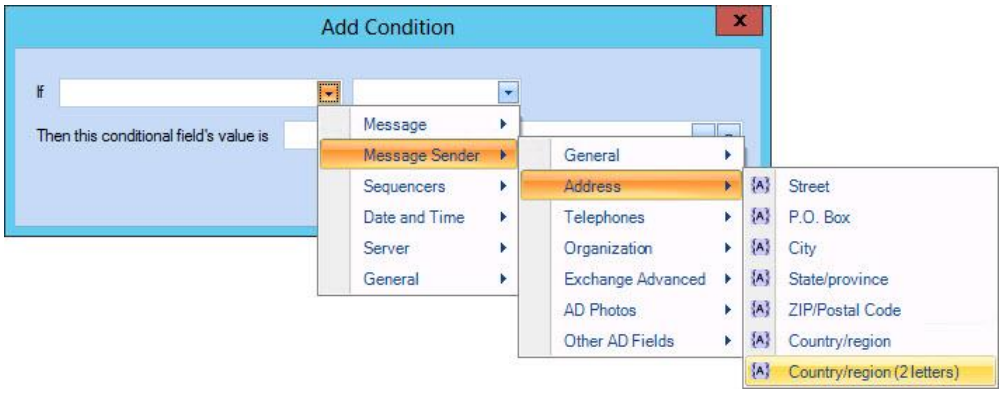
9. Click OK to exit back to the conditional field window:



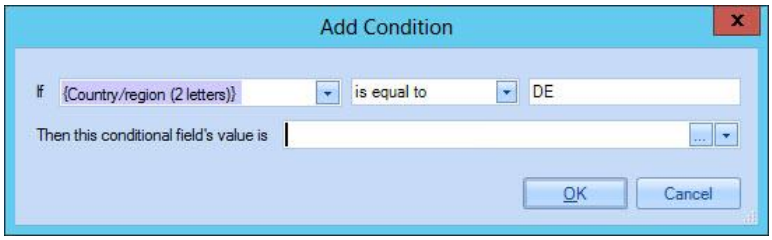
10. Click the add button to enter the second condition (i.e. to add signature content and associated rules for German users). The add condition window is displayed:



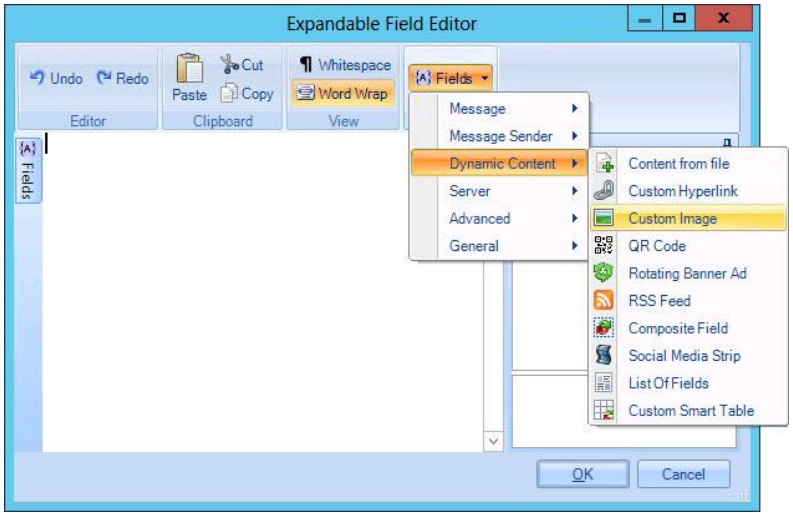
11. Using the drop-down lists associated with the if field, navigate to select message sender > address > country/region (2 letters) field:



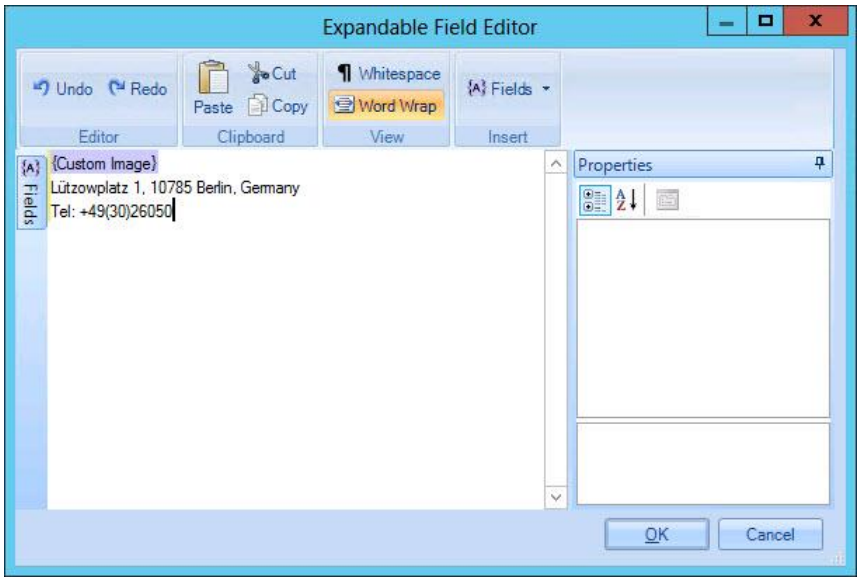
12. Leave the qualifier as the default is equal to and type DE into the associated value field:



13. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by German users). You can enter text and/or fields as required - to enter an image of a German flag, the custom image field can be used:



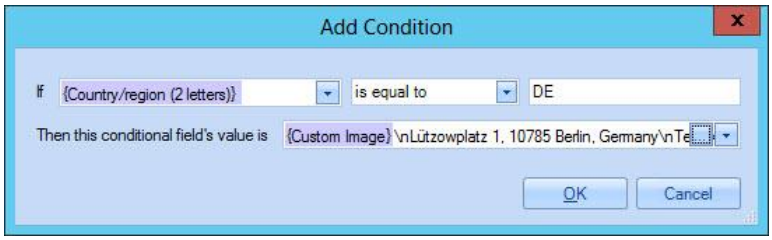
Select the required custom image [pg.235] in the normal way and add Berlin address details as text (alternatively, you could use Active Directory address fields if applicable):



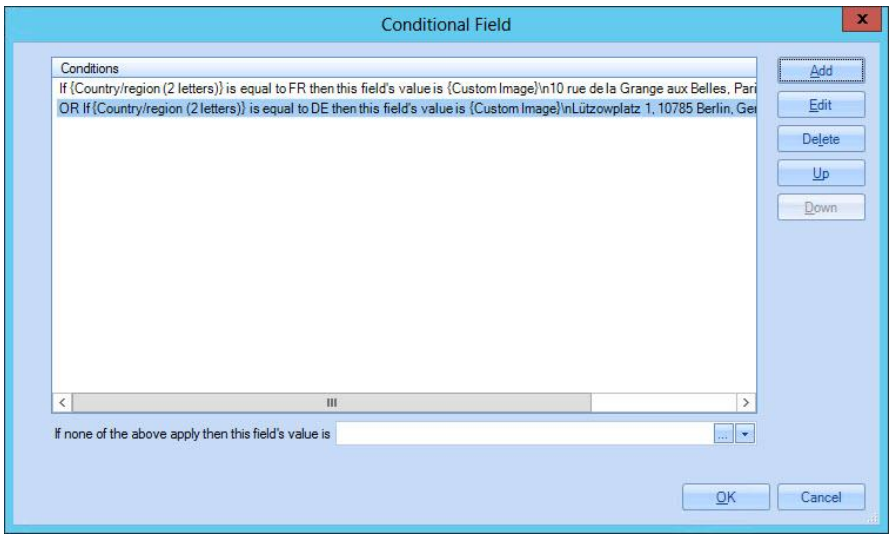
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional** field element as a whole. See step 20 [pg.290] for details about changing these properties.

14. Click OK to save changes and exit back to the add condition window, where your second condition is now displayed:

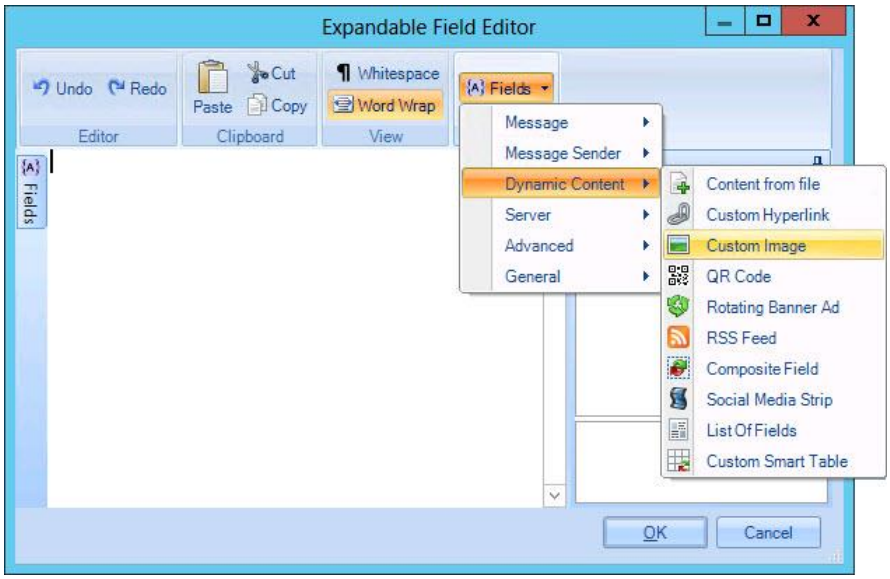


15. Click OK to exit back to the conditional field window where both conditions are now displayed:

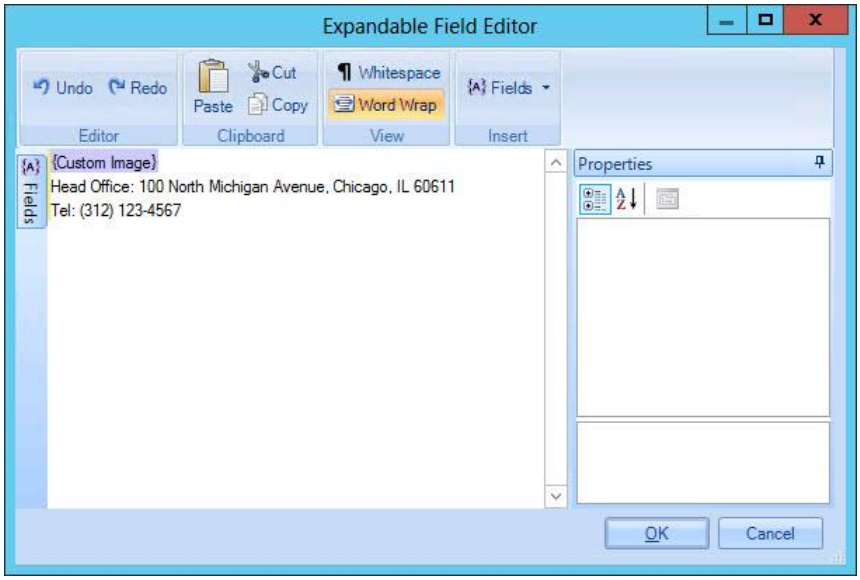

Conditional Field
Conditions
If {Country/region (2 letters)} is equal to FR then this field's value is {Custom Image}\n10 rue de la Grange aux Belles, Pari
OR If {Country/region (2 letters)} is equal to DE then this field's value is {Custom Image}\nLützowplatz 1, 10785 Berlin, Ge
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
OK
Cancel

16. To define signature content that should be applied for everyone else (i.e. people who are not in France or Germany), move to the bottom of this window and click the [...] button associated with the if none of the above apply then this field's value is field. The expandable field editor window is displayed.

17. Use this window to enter content to be used if neither of the specified conditions are met (i.e. for messages sent by non-French/German users). You can enter text and/or fields as required - to enter an image of a globe, the custom image field can be used:



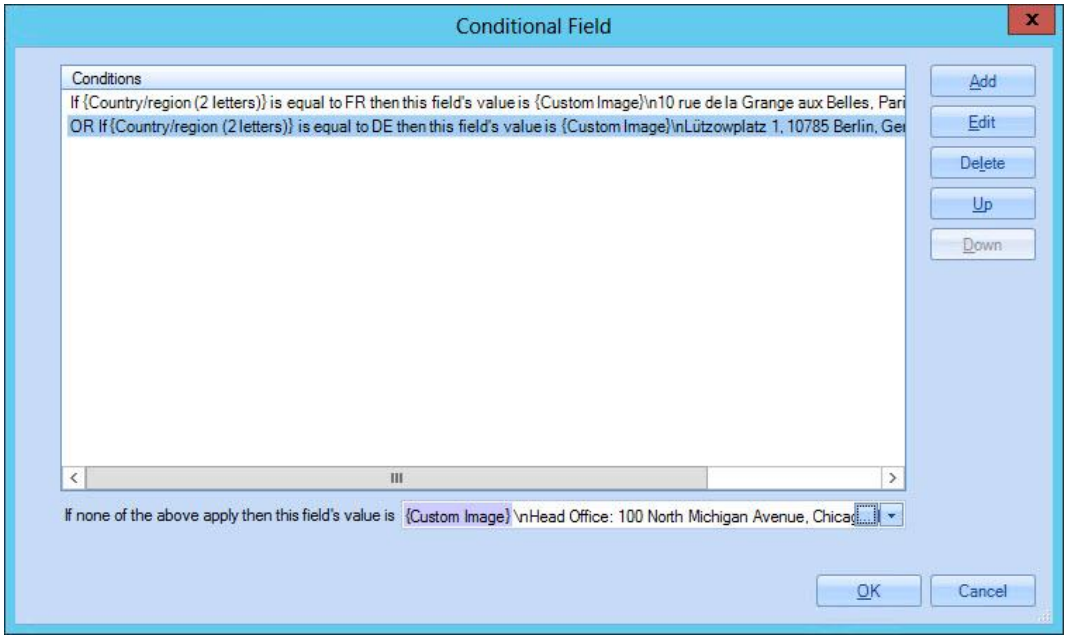
Select the required custom image [pg.235] in the normal way and add the Head Office address details as text (alternatively, you could use Active Directory address fields if applicable):



NOTE

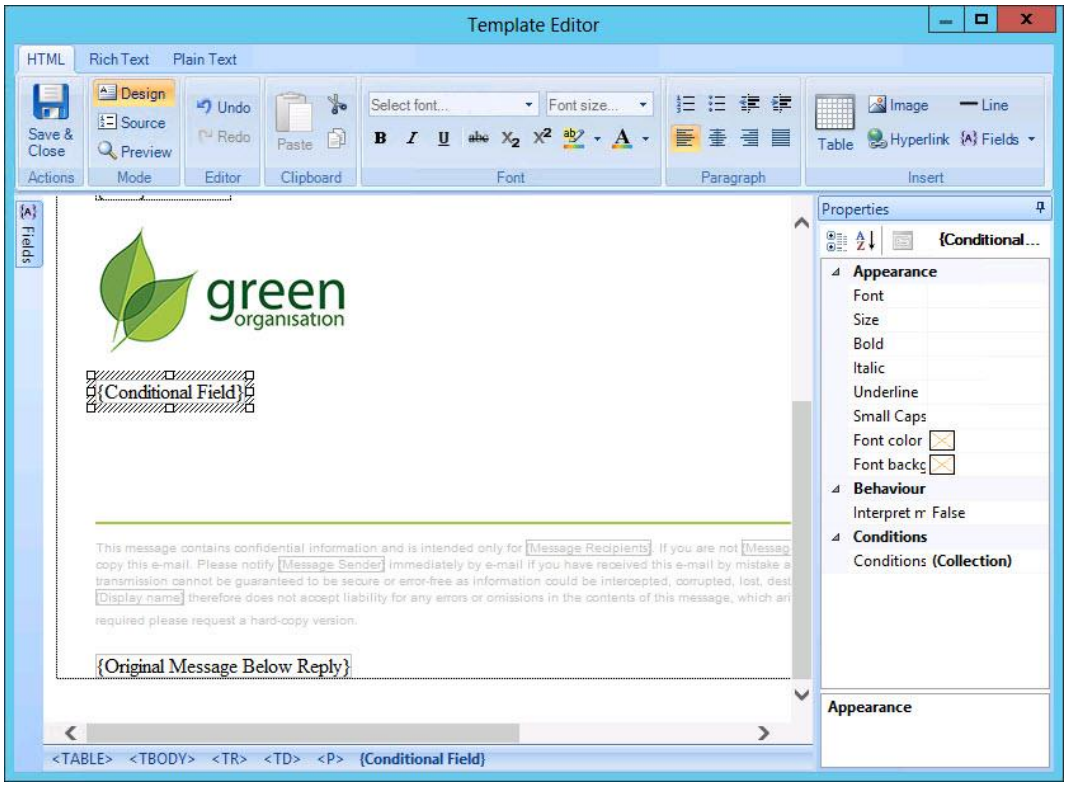
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 20 [pg.290] for details about changing these properties.

18. Click OK to save changes and exit back to the conditional field window:

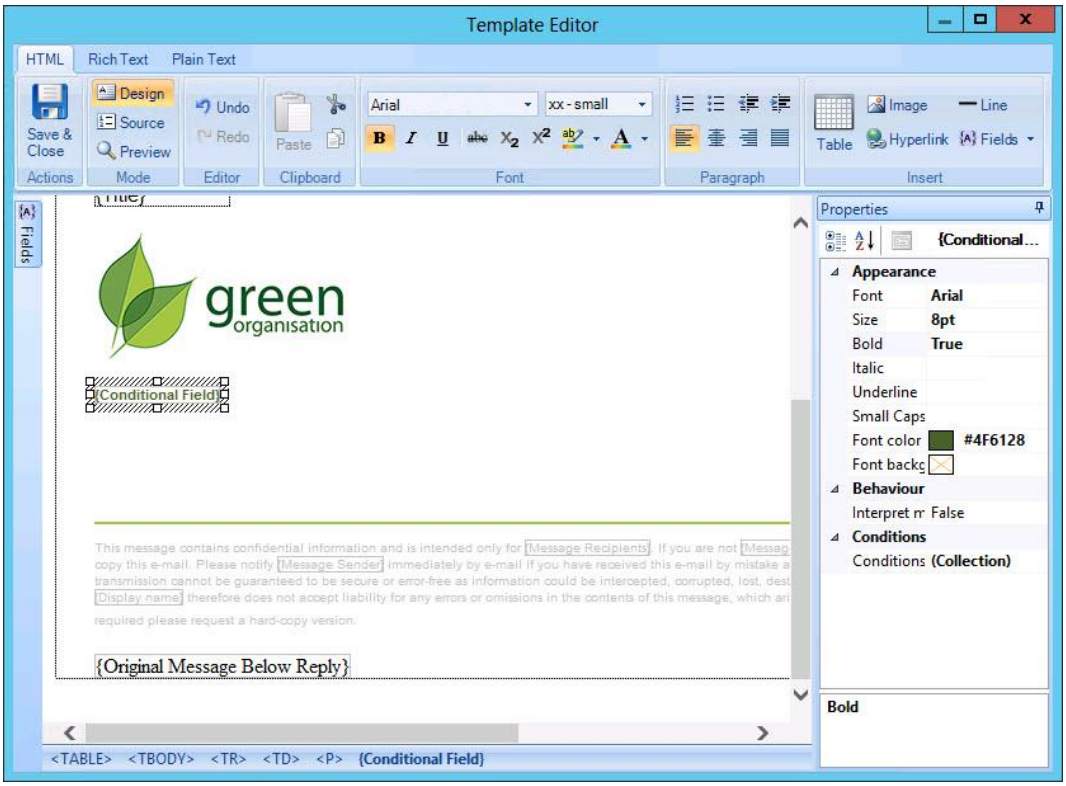

Conditional Field
Conditions
If {Country/region (2 letters)} is equal to FR then this field's value is {Custom Image}\n10 rue de la Grange aux Belles, Pari
OR If {Country/region (2 letters)} is equal to DE then this field's value is {Custom Image}\nLützowplatz 1, 10785 Berlin, Ger
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is {Custom Image} \nHead Office: 100 North Michigan Avenue, Chica
OK
Cancel

Settings for the conditional field are now complete, with two conditions (one for French users and one for German users) and then required content for everyone else.

19. Click OK to exit back to the template editor, where the conditional field is now shown:



20. Select this field and use appearance settings in the properties pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used:



In preview mode for a French user, this example is displayed as follows (notice that the text has the same font settings as those defined for the conditional field element above):

21. Save the template in the normal way. The template can now be associated with a signature policy [pg.64] where the only condition [pg.90] required is all messages (although you can apply further conditions at policy level, if necessary).

NOTE

Using nested conditional fields (i.e. adding one **conditional field** within another **conditional field**) can be a particularly powerful approach for advanced users who need to create complex signatures to cater for a wide range of scenarios within an organization. For further information, please refer to the conditional field example 3 (advanced) [pg.291] section.

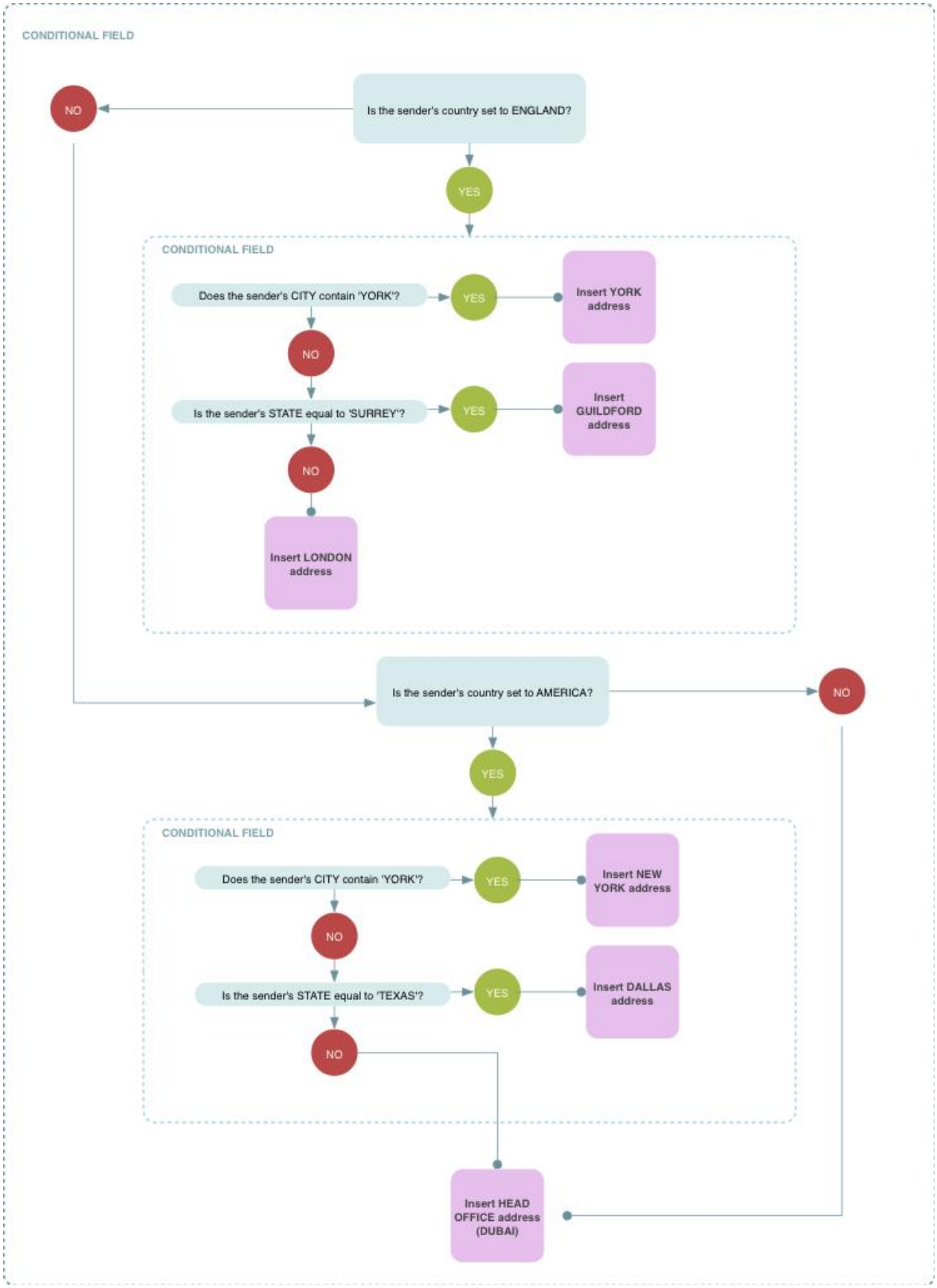
Conditional Field Example 3 (advanced)

This example shows advanced use of the conditional field being used to apply different signature content for users. In the case, nested conditional fields (i.e. one conditional field within another conditional field) are used to achieve the example scenario below:

- If a user's country is equal to England then insert a Conditional Field where:
  - If the user's town contains York then insert the York address
  - If the user's state is equal to Surrey then insert the Guildford address
  - Otherwise insert the London address
- If a user's country is equal to America then insert a Conditional Field where:
  - If the user's town contains York then insert the New York address
  - If the user's state contains Texas then insert the Dallas address
- Otherwise insert the Dubai head office address

For clarity, this example is illustrated on the following page.

Advanced conditional field scenario:



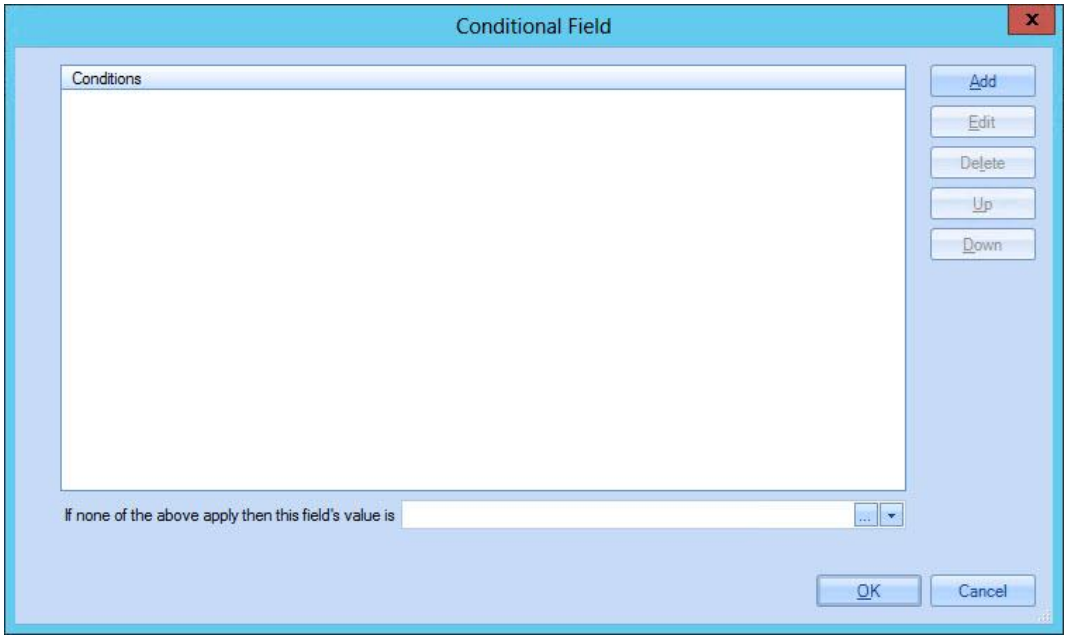
To achieve this scenario using Exclaimer Signature Manager Exchange Edition, follow the steps below:

- Stage 1: Add a conditional field and specify the first condition for users based in England (via a nested conditional field to refine by city/state) [pg.293]
- Stage 2: Specify the second condition for users based in America (via a nested conditional field to refine by city/state) [pg.300]
- Stage 3: Specify signature content for all other users (i.e. users who are not in England or America) [pg.305]

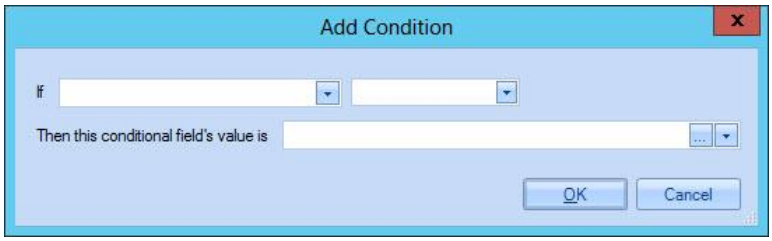
Additionally, further information about how appearance properties for nested fields are inherited from the 'master' field can be found in the understanding inheritance of appearance properties [pg.307] section, at the end of this section.

Stage 1: Add a Conditional Field & Specify the First Condition for Users Based in England

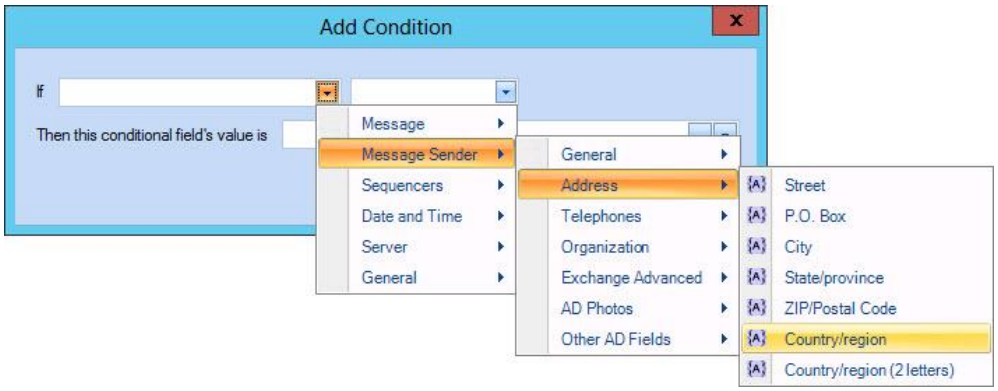
1. Edit [pg.193] or create [pg.185] the required template so that the template editor is open.
2. Position your cursor at the position where conditional content is required.
3. Using the fields panel, navigate to select the advanced > conditional field. The conditional field window is displayed:



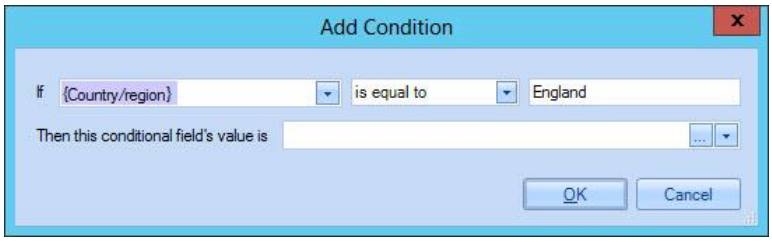
4. Click the add button to enter the first condition (i.e. to add signature content and associated rules for users based in England). The add condition window is displayed:



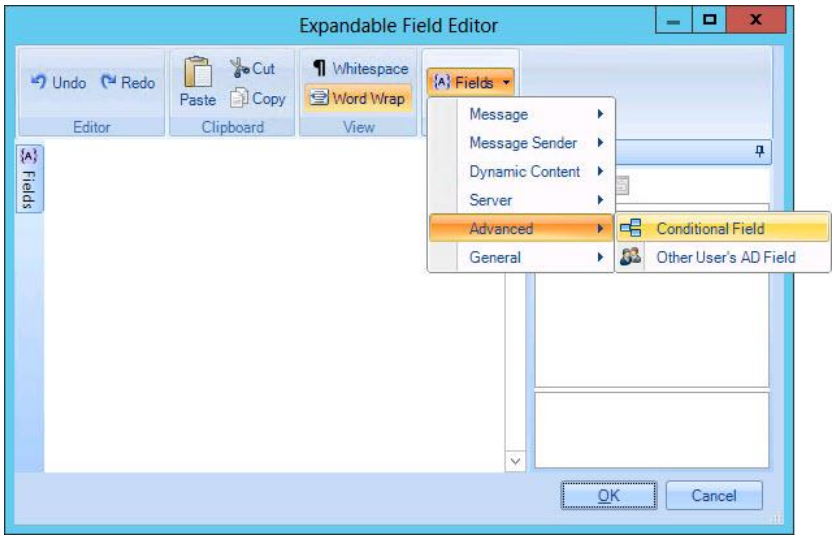
5. Using the drop-down lists associated with the if field, navigate to select message sender > address > country/region field:



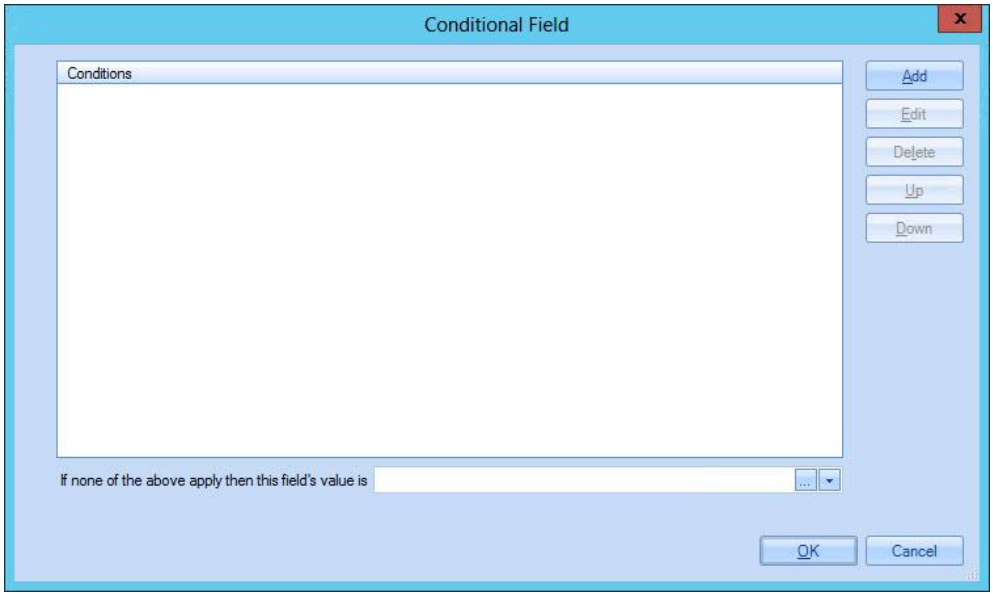
6. Leave the qualifier as the default is equal to and type England into the associated value field:



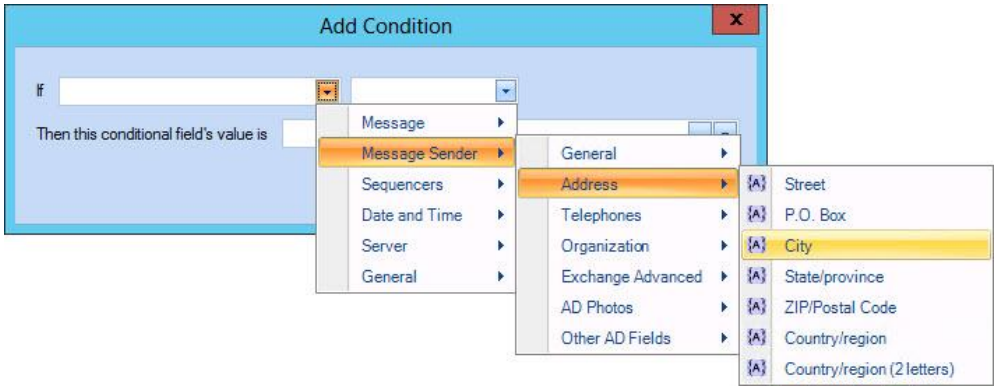
7. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter another conditional field to determine the city/state and thus signature content for users in England. First, navigate to select advanced > conditional field:



The conditional field window is displayed:

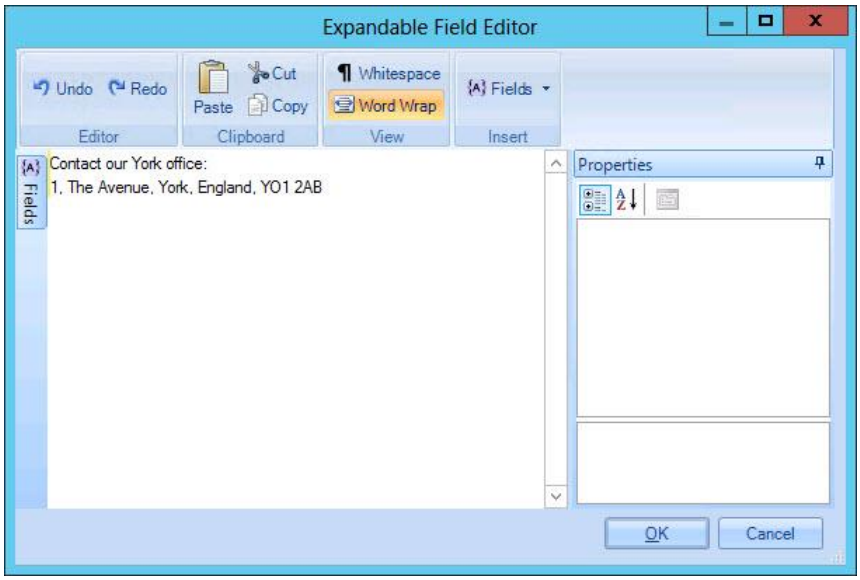


8. Click the add button to enter the first condition (i.e. to add signature content and associated rules for users based in York). The add condition window is displayed. Using the drop-down lists associated with the if field, navigate to select message sender > address > city field:



9. Click OK to save changes and exit back to the add condition window, where your condition is now displayed. Change the qualifier to contains and type York into the associated value field (alternatively, you could use the equal to qualifier and enter the value as New York):

10. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in York, England). You can enter text and/or fields as required:



NOTE

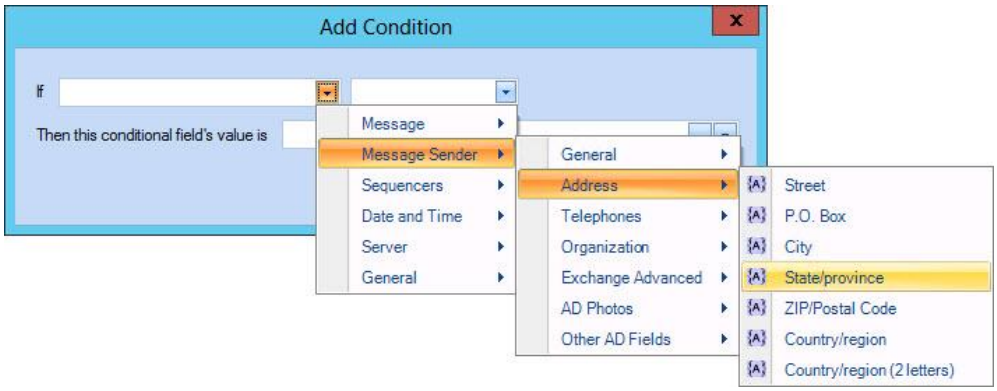
By default, any text entered here will inherit font and other formatting properties which are applied to the 'master' **conditional field** element as a whole (as defined at the very end of this process). However, if you wish to apply specific appearance properties for England signatures, you can define them in step 21 [pg.299].

For further information about how appearance properties for nested fields are inherited from the 'master' field, see understanding inheritance of appearance properties [pg.307].

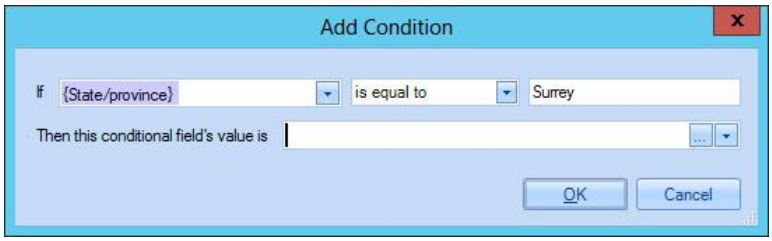
11. Click OK to save changes and exit back to the add condition window.

12. Click OK to exit back to the conditional field window.

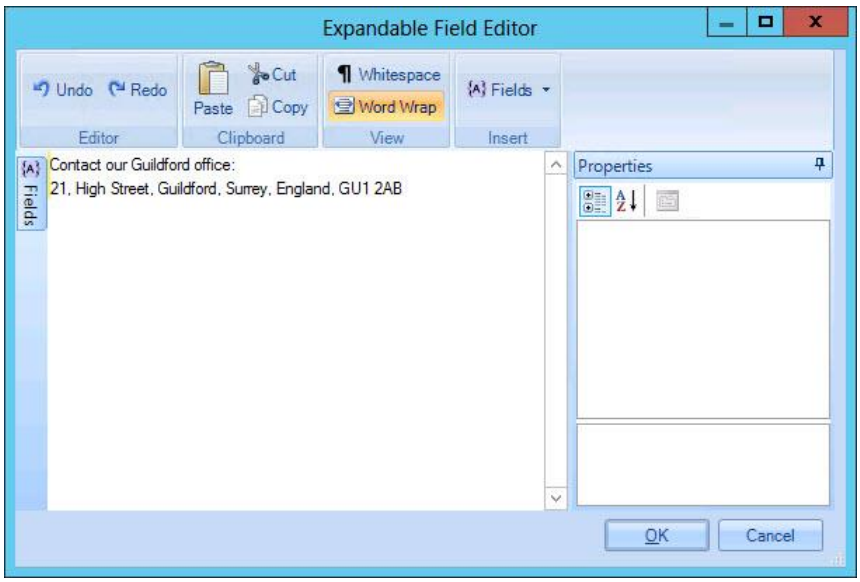
13. Click the add button to enter the condition (i.e. to add signature content and associated rules for users based in Surrey). The add condition window is displayed. Using the drop-down lists associated with the if field, navigate to select message sender > address > state/province field:



14. Click OK to save changes and exit back to the add condition window, where your condition is now displayed. Leave the qualifier as the default is equal to and type Surrey into the associated value field:



15. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in Surrey, England). You can enter text and/or fields as required:

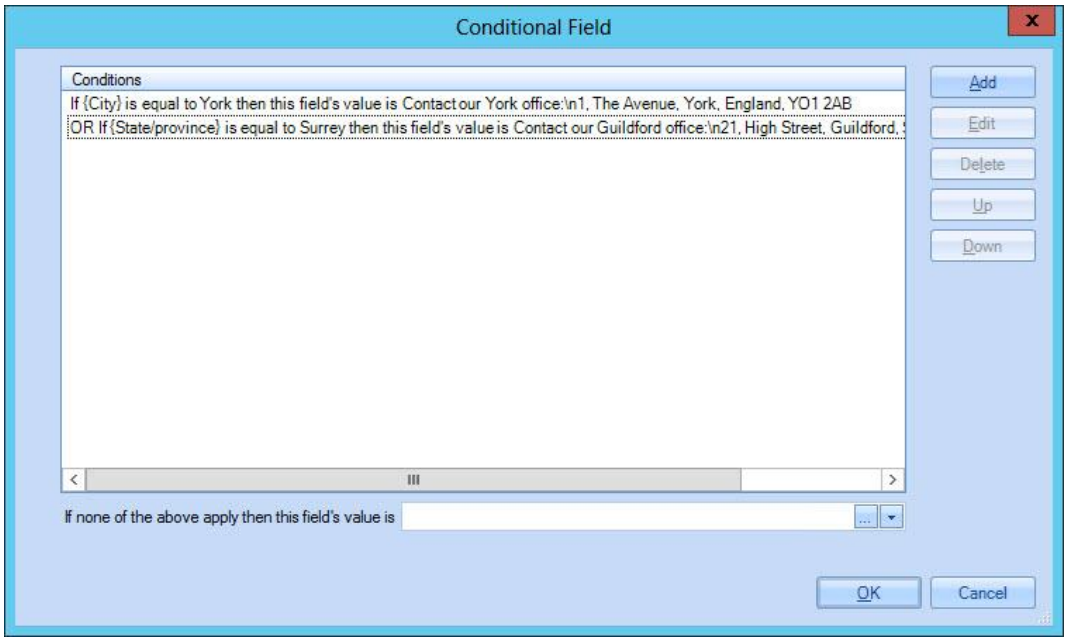


NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 21 [pg.299] for details about changing these properties.

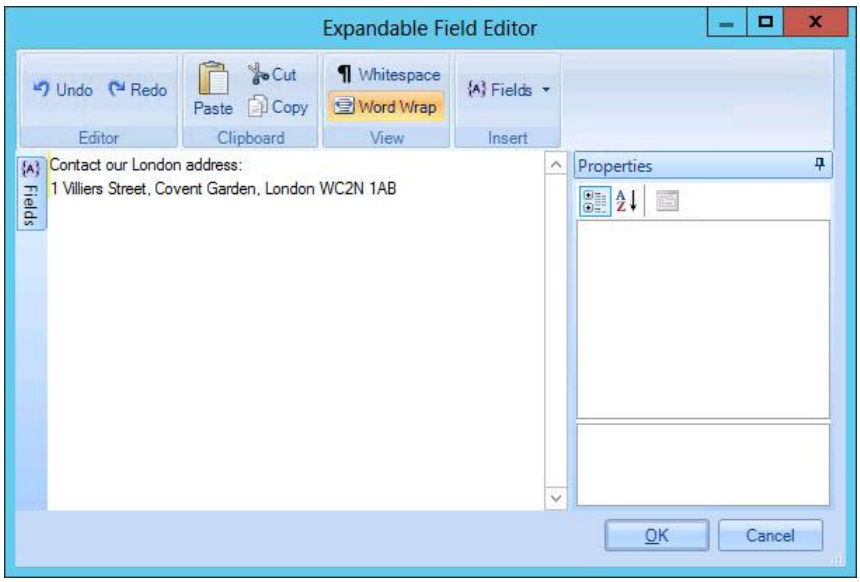
16. Click OK to save changes and exit back to the add condition window.

17. Click OK to exit back to the conditional field window:


Conditional Field
Conditions
If {City} is equal to York then this field's value is Contact our York office:\n1, The Avenue, York, England, YO1 2AB
OR If {State/province} is equal to Surrey then this field's value is Contact our Guildford office:\n21, High Street, Guildford,
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
OK
Cancel

18. To define signature content that should be applied for all other users based in England (i.e. people who are not in York or Surrey), move to the bottom of this window and click the [...] button associated with the if none of the above apply then this field's value is field. The expandable field editor window is displayed.

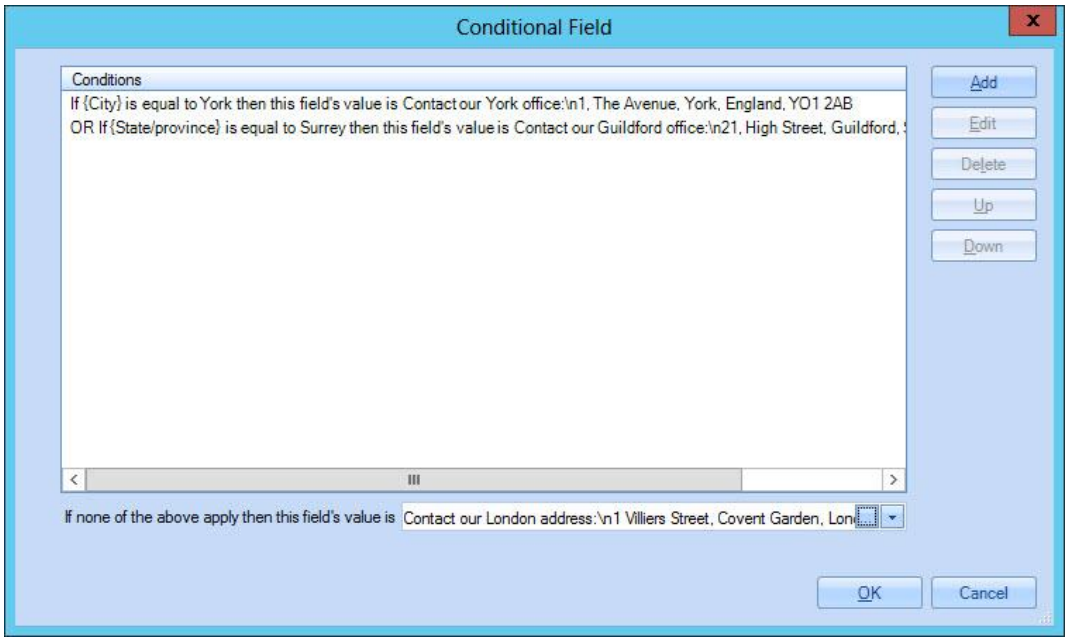
19. Use this window to enter content to be used - i.e. the London address. You can enter text and/or fields as required:



NOTE

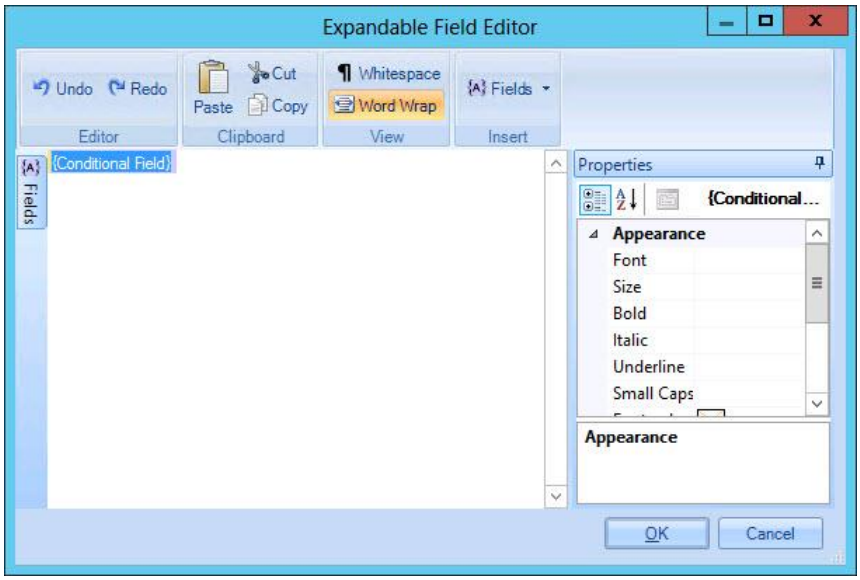
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 21 [pg.299] for details about changing these properties.

20. Click OK to save changes and exit back to the conditional field window:


Conditional Field
Conditions
If {City} is equal to York then this field's value is Contact our York office:\n1, The Avenue, York, England, YO1 2AB
OR If {State/province} is equal to Surrey then this field's value is Contact our Guildford office:\n21, High Street, Guildford,
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
Contact our London address:\n1 Villiers Street, Covent Garden, Lon
OK
Cancel

Settings for the conditional field are now complete, with two conditions (one for York users and one for Surrey users) and then required content for all other users based in England.

21. Click OK to exit back to the expandable field editor for the England condition, which now contains a conditional field element:



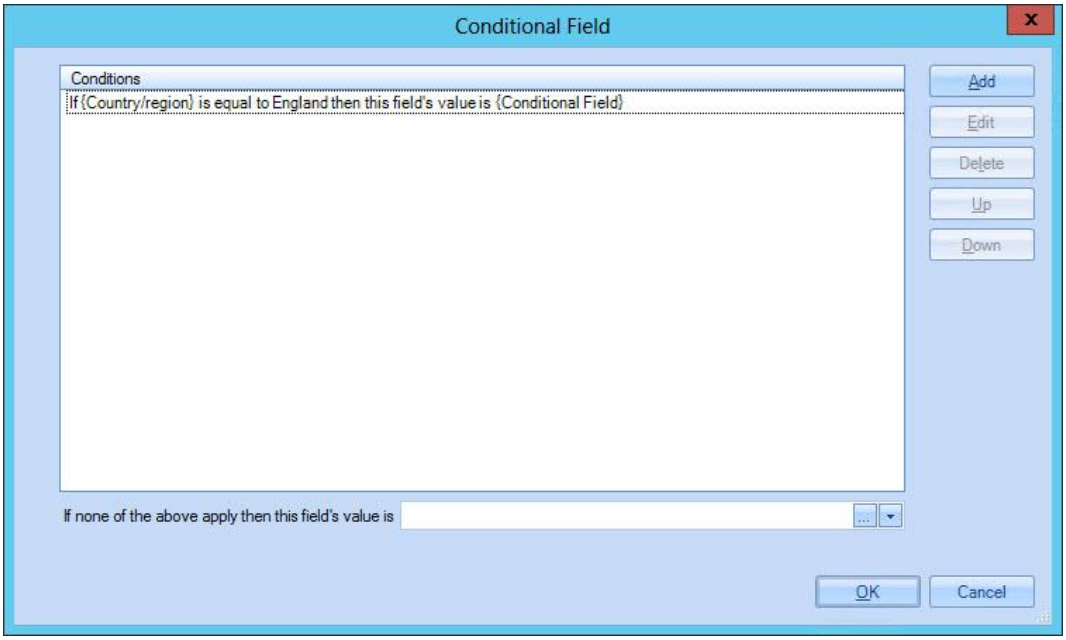
NOTE

If required, select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the window) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used - i.e. to all 'English' signature content.

However, **appearance** property settings for nested fields are inherited from the 'master' **conditional field**, so if you intend to use the same formatting for all signature content (i.e. for users based in England, America or anywhere else) then you can leave these settings as they are and update properties for the final conditional field at the end of this process (see stage 3, step 5 [pg.307]). For further information about how appearance properties for nested fields are inherited from the 'master' field, see understanding inheritance of appearance properties [pg.307].

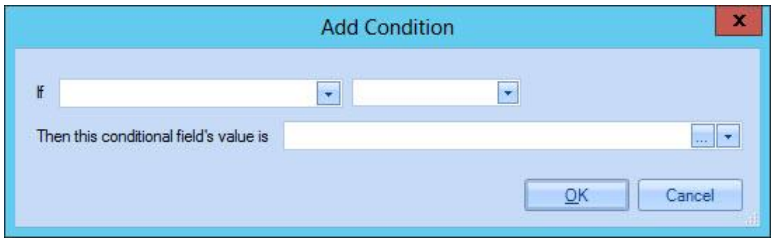
22. Click OK to save changes and exit back to the add condition window.

23. Click OK to exit back to the conditional field window, where the condition for England is now shown:

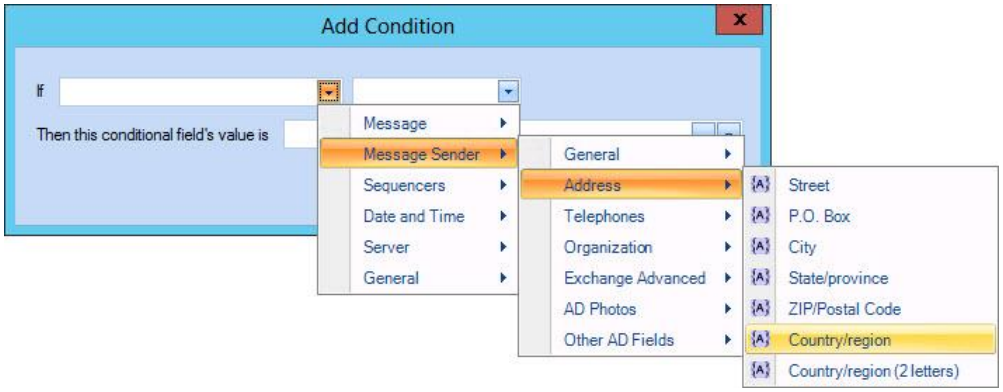


Stage 2: Specify the Second Condition for Users Based in America

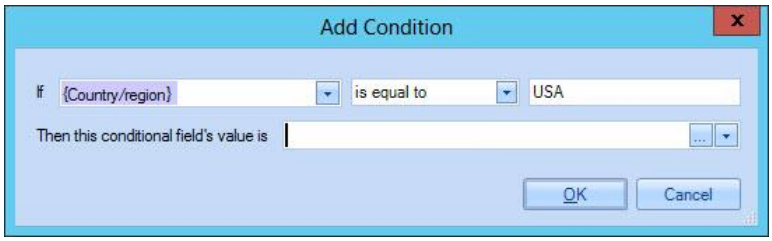
1. Click the add button to enter the first condition (i.e. to add signature content and associated rules for users based in America). The add condition window is displayed:



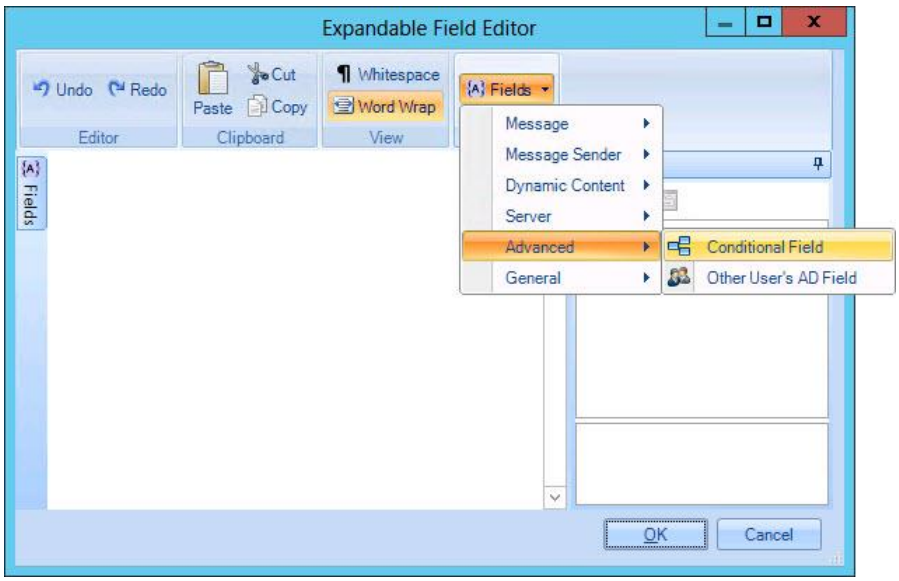
2. Using the drop-down lists associated with the if field, navigate to select message sender > address > country/region field:



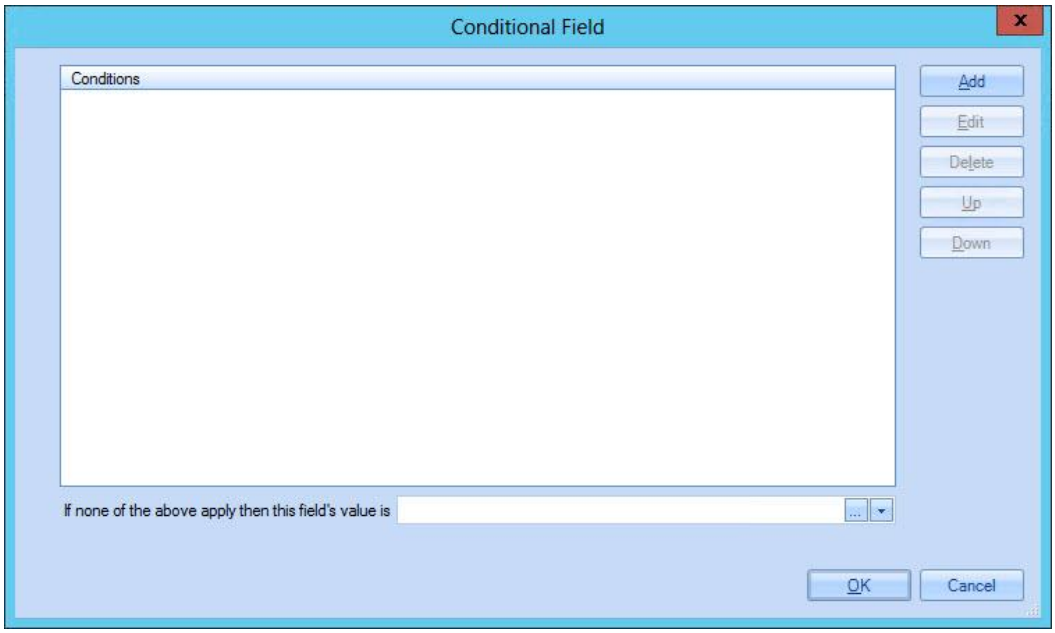
3. Leave the qualifier as the default is equal to and type USA into the associated value field:



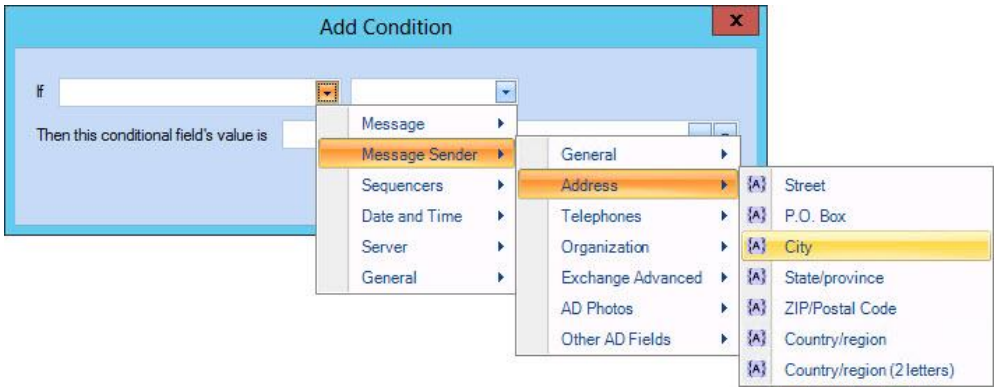
4. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Use this window to enter another conditional field to determine the city/state and thus signature content for users in the USA. First, navigate to select advanced > conditional field:



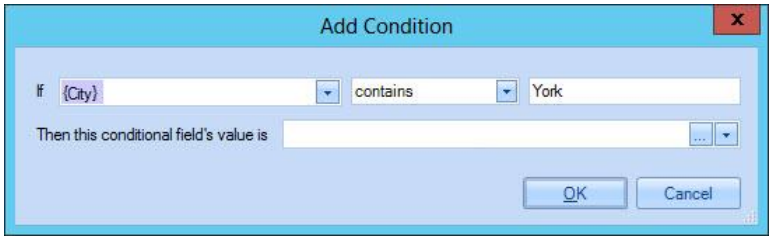
The conditional field window is displayed:



5. Click the add button to enter the first condition (i.e. to add signature content and associated rules for users based in New York). The add condition window is displayed. Using the drop-down lists associated with the if field, navigate to select message sender > address > city field:

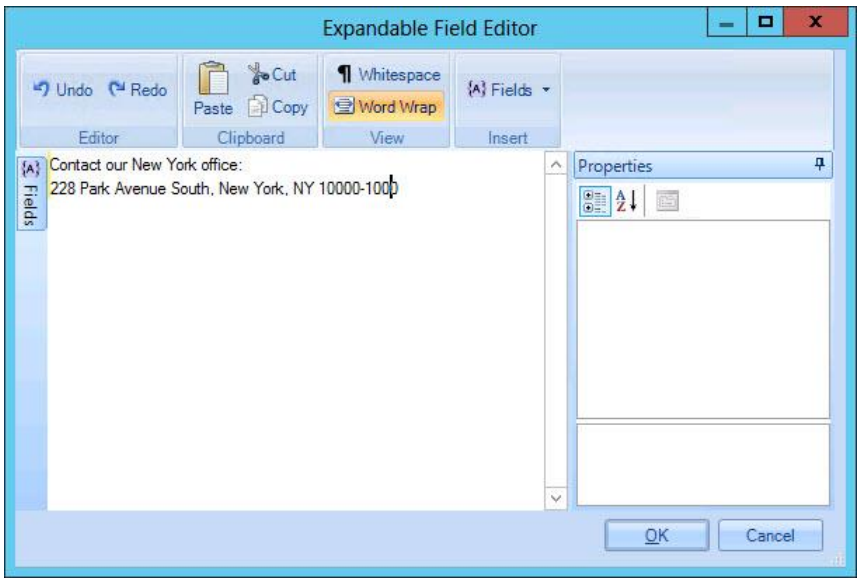


6. Click OK to save changes and exit back to the add condition window, where your condition is now displayed. Change the qualifier to contains and type York into the associated value field:



Notice we have only entered 'York' here because we know that no other cities contain 'York'. However, if you are not confident about this, be precise and use equal to / New York instead).

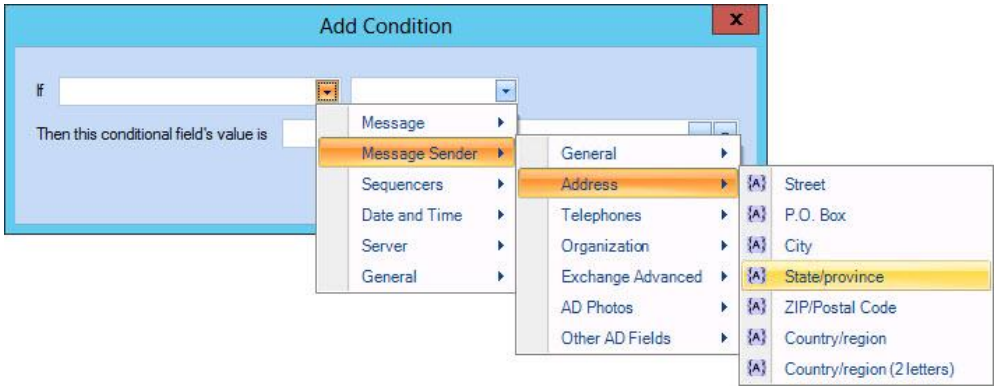
7. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Enter content to be inserted if the associated condition is met - i.e. for messages sent by users based in New York, USA. You can enter text and/or fields as required:



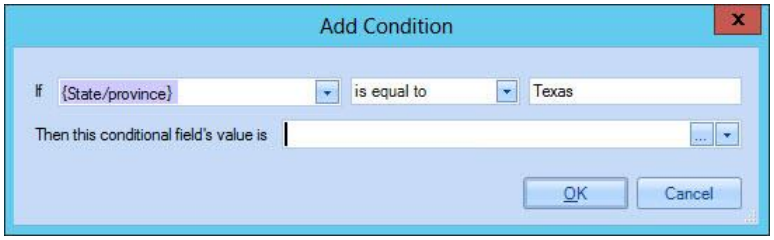
NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 15 [pg.304] for details about changing these properties.

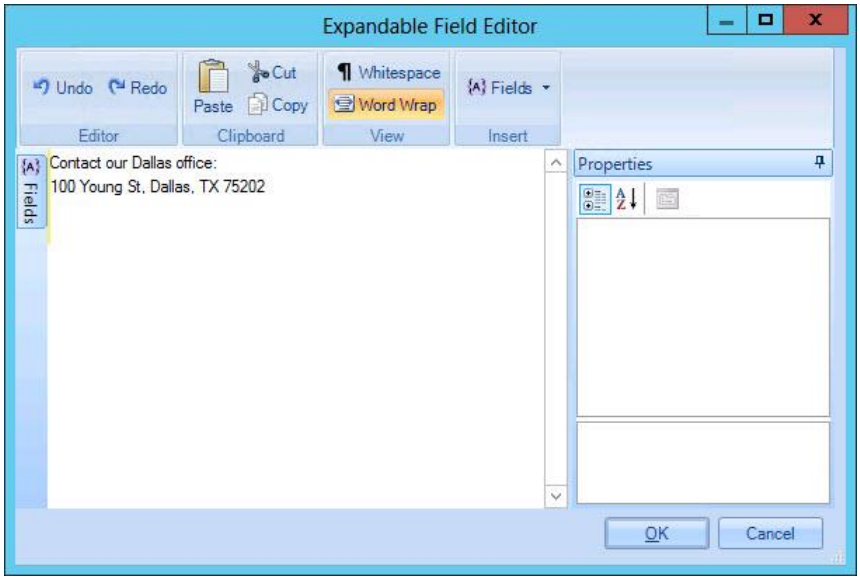
8. Click OK to save changes and exit back to the add condition window.
9. Click OK to exit back to the conditional field window.
10. Click the add button to enter the condition (i.e. to add signature content and associated rules for users based in Texas). The add condition window is displayed. Using the drop-down lists associated with the if field, navigate to select message sender > address > state/province field:



11. Click OK to save changes and exit back to the add condition window, where your condition is now displayed. Leave the qualifier as the default is equal to and type Texas into the associated value field:



12. Click the [...] button associated with the then this conditional field's value is field to open the expandable field editor window. Enter content to be inserted if the associated condition is met (i.e. for messages sent by users based in Texas, America). You can enter text and/or fields as required:

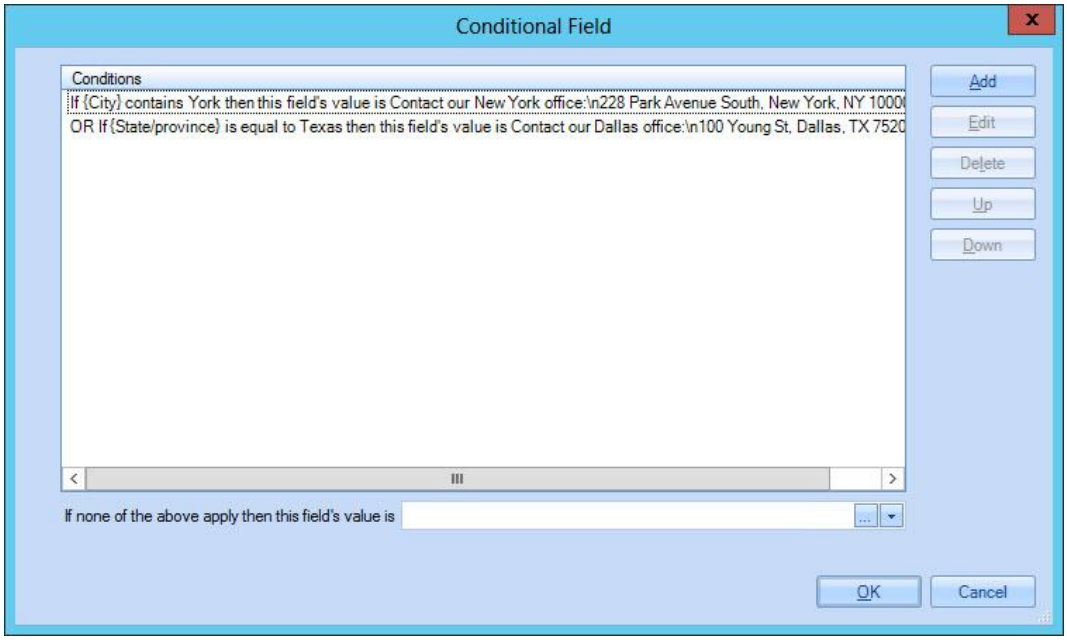


NOTE

Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 15 [pg.304] for details about changing these properties.

13. Click OK to save changes and exit back to the add condition window.

14. Click OK to exit back to the conditional field window:


Conditional Field
Conditions
If {City} contains York then this field's value is Contact our New York office:\n228 Park Avenue South, New York, NY 1000
OR If {State/province} is equal to Texas then this field's value is Contact our Dallas office:\n100 Young St, Dallas, TX 7520
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
OK
Cancel

15. Click OK to exit back to the expandable field editor for the USA condition, which now contains a conditional field element:

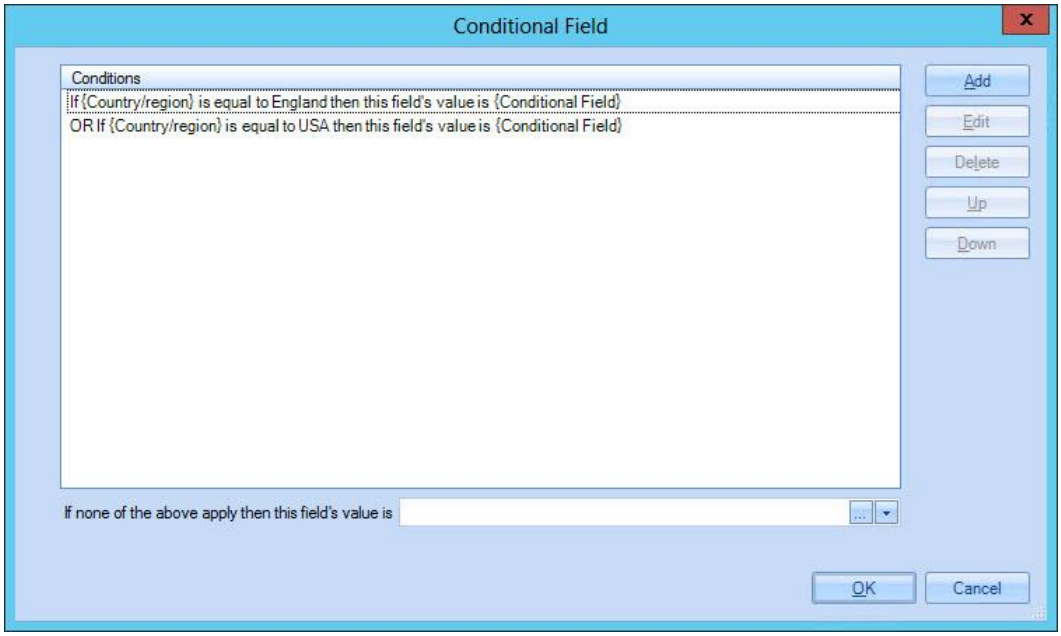
NOTE

If required, select this field and use **appearance** settings in the **properties** pane (on the right-hand side of the window) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used - i.e. to all 'English' signature content.

However, **appearance** property settings for nested fields are inherited from the 'master' **conditional field**, so if you intend to use the same formatting for all signature content (i.e. for users based in England, America or anywhere else) then you can leave these settings as they are and update properties for the final conditional field at the end of this process (see stage 3, step 5 [pg.307]). For further information about how appearance properties for nested fields are inherited from the 'master' field, see understanding inheritance of appearance properties [pg.307].

16. Click OK to save changes and exit back to the add condition window.

17. Click OK to exit back to the conditional field window, where the condition for USA is now shown:

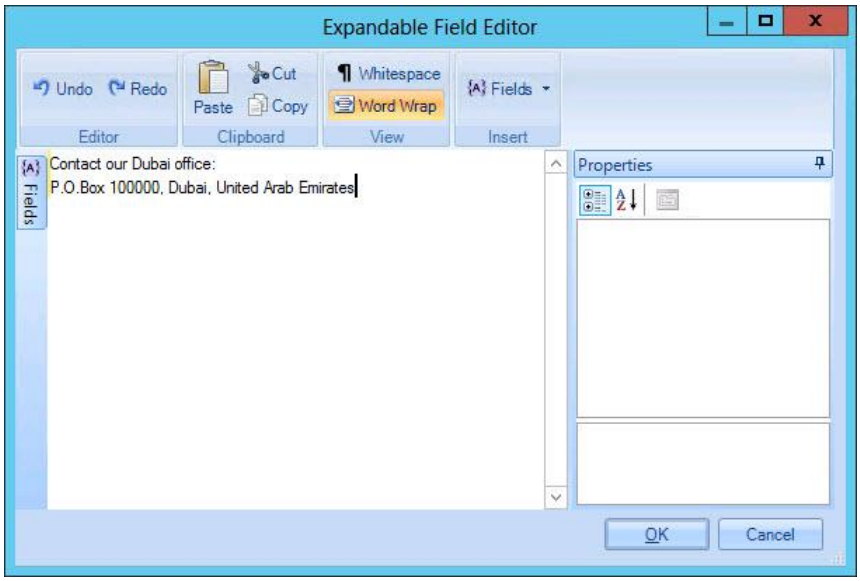

Conditional Field
Conditions
If {Country/region} is equal to England then this field's value is {Conditional Field}
OR If {Country/region} is equal to USA then this field's value is {Conditional Field}
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
OK
Cancel

Stage 3: Specify Signature Content for All Other Users

With the 'master' conditional field window now defined with two conditions (one for England and the other for USA), the final requirement is to define signature settings for 'everyone else' - i.e. users who are not based in England, New York or Texas. To do this:

1. Move to the bottom of the conditional field window and click the [...] button associated with the if none of the above apply then this field's value is field. The expandable field editor window is displayed.

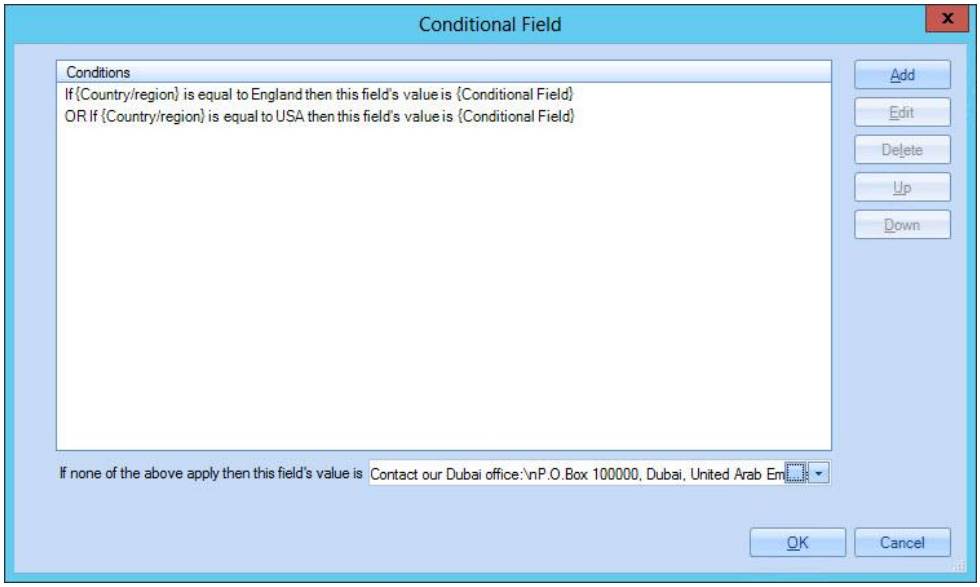
2. Use this window to enter content to be used if neither of the specified conditions are met (i.e. for messages sent by users who are not based in England, New York or Texas). You can enter text and/or fields as required:



NOTE

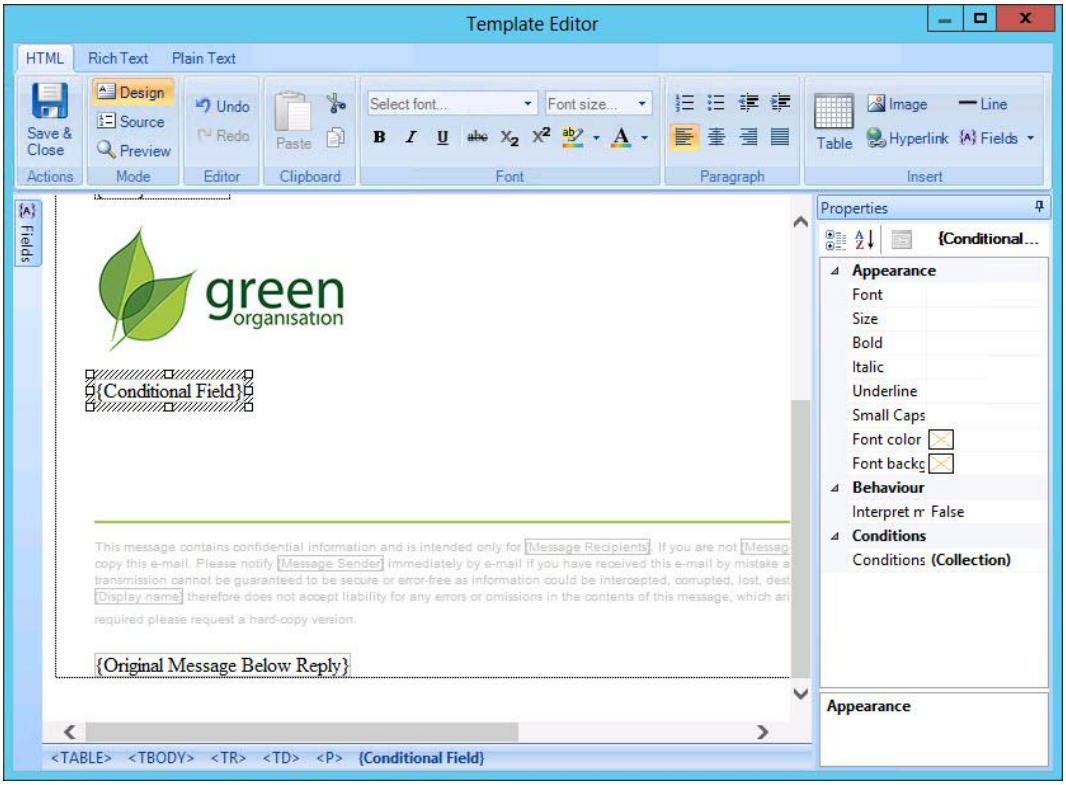
Any text entered here will inherit font and other formatting properties which are applied to the **conditional field** element as a whole. See step 5 [pg.307] for details about changing these properties.

3. Click OK to save changes and exit back to the conditional field window:


Conditional Field
Conditions
If {Country/region} is equal to England then this field's value is {Conditional Field}
OR If {Country/region} is equal to USA then this field's value is {Conditional Field}
Add
Edit
Delete
Up
Down
If none of the above apply then this field's value is
Contact our Dubai office:\nP.O.Box 100000, Dubai, United Arab Em
OK
Cancel

Settings for the conditional field are now complete, with two conditions (one for England users and one for USA users) and then required content for everyone else.

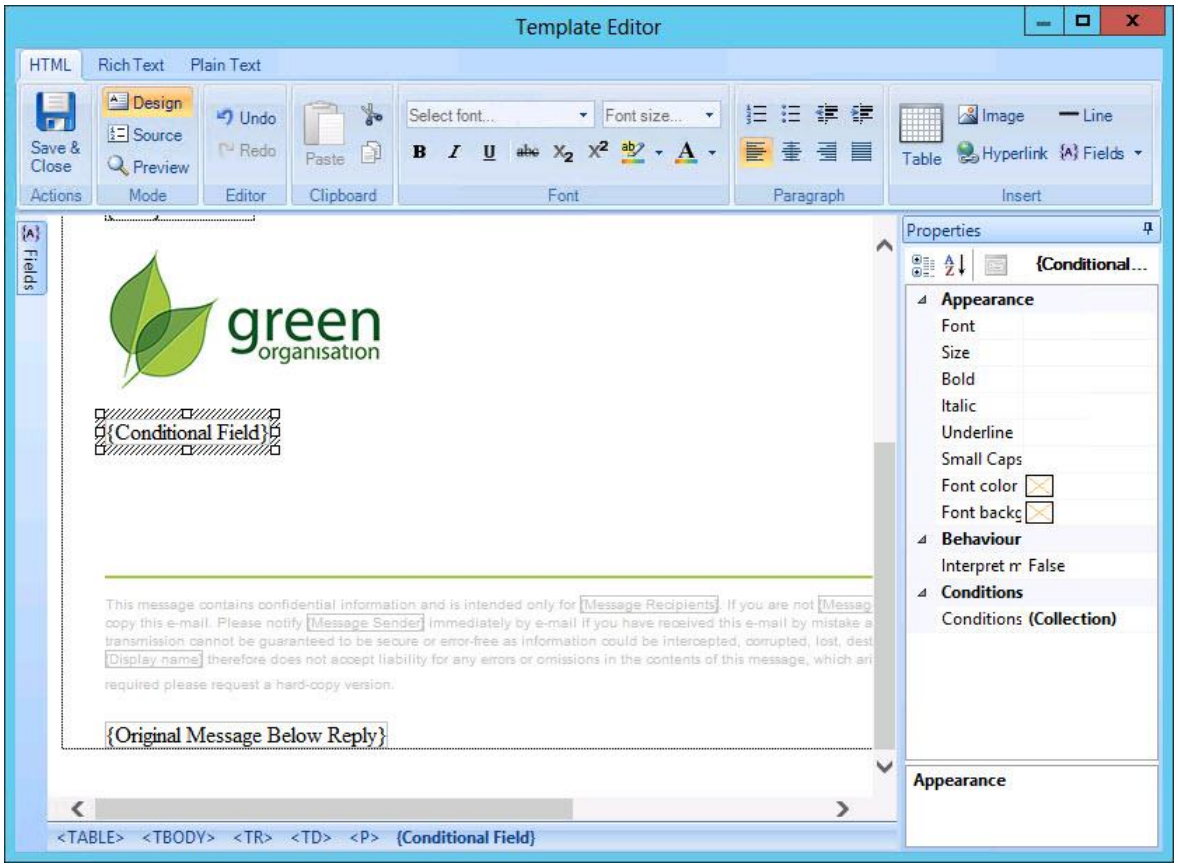
4. Click OK to exit back to the template editor, where the conditional field is now shown:



5. Select this field and use appearance settings in the properties pane (on the right-hand side of the template editor) to apply required formatting. Any properties specified here will be applied to the associated conditional content when it is used (see below for further information about how nested conditional fields inherit appearance properties).

Understanding Inheritance of Appearance Properties

Having added the 'master' conditional field to the template, you can select it and then set appearance properties (on the right-hand side of the template editor) to apply required formatting:



Any properties specified here will be applied to the associated conditional content when it is used. However, in this case, we know that the conditional field contains other conditional fields, so it is important to understand how nested fields inherit properties from the 'master' field.

If you choose to set appearance properties for nested conditional fields, content for those nested fields will be formatted as per those properties - they will not inherit the appearance properties of this 'master' conditional field.

For example, suppose that you wanted to format signatures as follows:

- England address to be formatted as: Arial, 8pt, Green (you would define these properties at stage 1, step 21 [pg.299])
- USA address to be formatted as: Arial, 10pt, Red (you would define these properties at stage 2, step 15 [pg.304])
- Address for everyone else to be formatted as: Grey (you would define these properties at stage 3, step 5 [pg.307])

General Fields

Fields in the general fields section are summarized below:

Field	Inserts...
Current Date	The current date (which may not necessarily be the same as the message sent date)

Properties

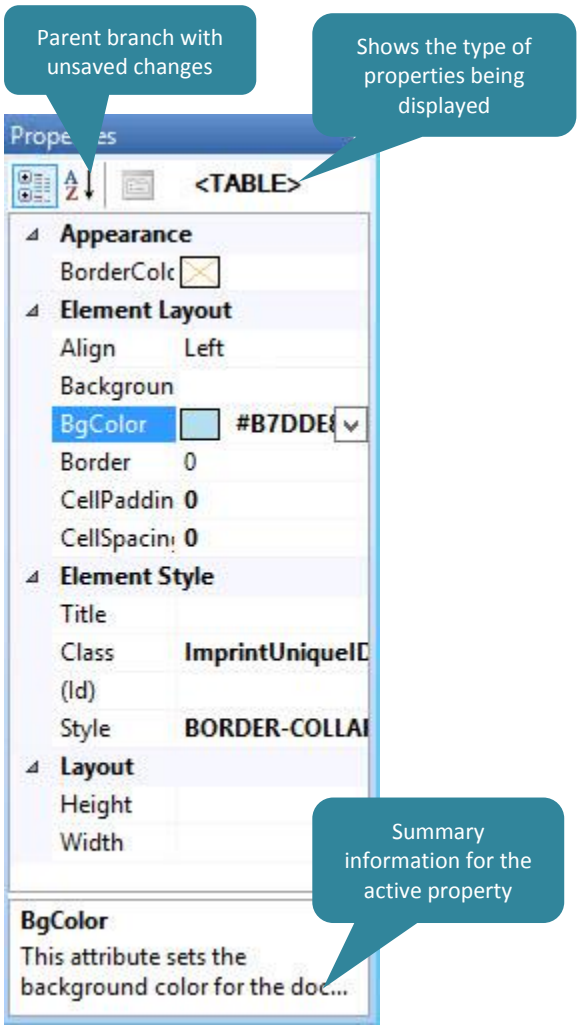
Properties are used to format and control template content. Almost every piece of content added to a template will have properties associated with it. For example, a section of text will have various font properties, a table cell will have border and background color properties and a hyperlink will have URL and target properties.

Properties are used in all template types - HTML, RTF and Plain Text. This section contains useful information for working with properties, including:

- Working with the properties pane [pg.310]
- Examples of properties in use [pg.313]

Working With the Properties Pane

The properties pane updates to reflect the current selection in the template editor:



The title at the top of the properties panel shows the type of properties displayed - i.e. the nature of the selected item of content. In the above example, a table was selected in the HTML editor, so the title of the property pane is displayed as <table>.

Many properties are associated with drop-down lists so you can select a pre-defined value, whilst others require direct input. At the bottom of the properties pane, a small information area displays summary text for the currently selected property.

NOTE

Remember - almost all items of content entered into the template editor will have properties associated with them. If you aren't sure how to change something, select it and check available properties.

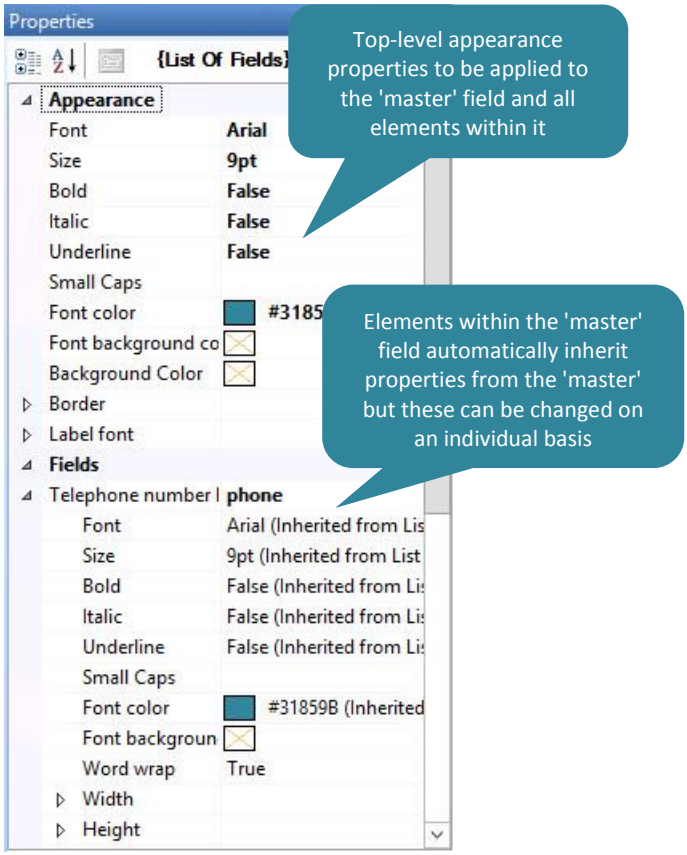
Understanding How Properties are Inherited

As noted above, almost all items of content (i.e. text, images and fields) added to templates will have properties that can be used to define formatting and/or behavior. However, when you are working with content for templates, it is likely that you will encounter fields which are comprised of other fields. For example:

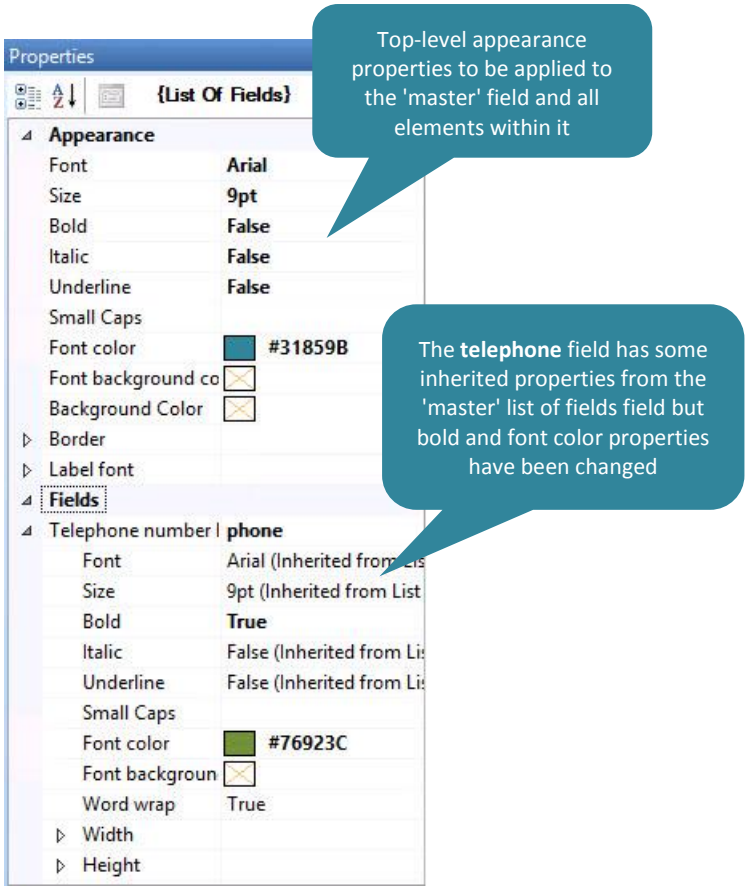
- The contact block [pg.223] field is typically comprised of multiple message sender [pg.222] fields
- The address block [pg.226] field is typically comprised of multiple message sender [pg.222] > address [pg.226] fields
- A list of fields [pg.260] is comprised of any range of other fields
- A conditional field [pg.270] might include other fields (and indeed other conditional fields)

Where one field (i.e. the 'master' field) contains another field, any properties associated with the 'master' field will be inherited by the fields contained within it. This is illustrated in the example below, where a list of fields item contains a number of fields, including telephone number.

When the list of fields item is selected, the properties pane shows that font settings for this item are set to Arial, 9pt, Blue. Then, when the fields section of the properties panel is expanded, each of the fields contained within this item are shown with their own properties - by default, these are inherited from the main list of fields item and this is explicitly stated in the property values:



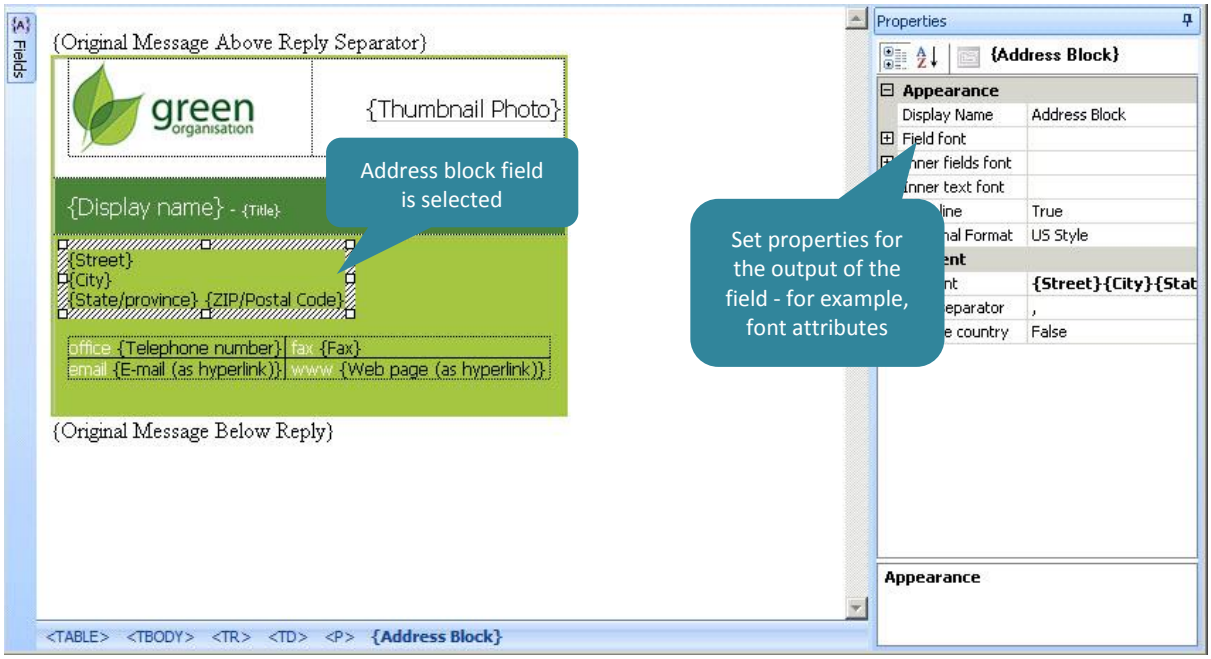
If required, you can change the values associated with inherited properties on an individual basis, as shown below:



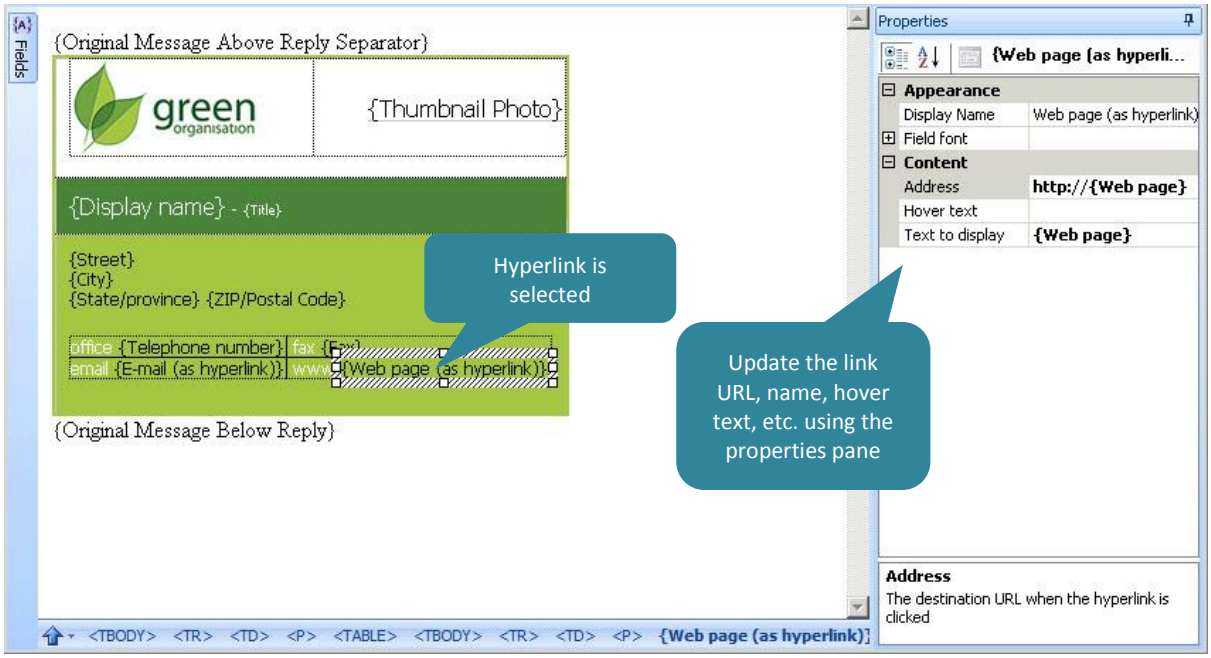
Examples of Properties in Use

The following examples show how the properties pane [pg.310] updates to reflect selected content in the template editor:

Field Properties



Hyperlink Properties



Text Properties

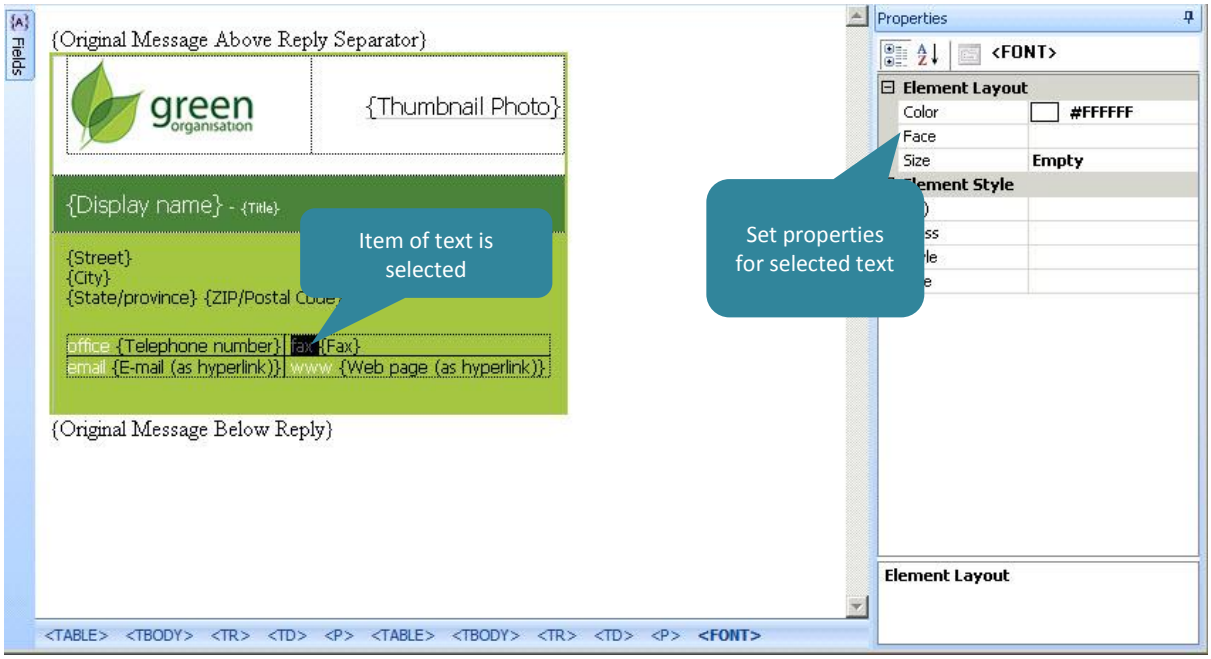
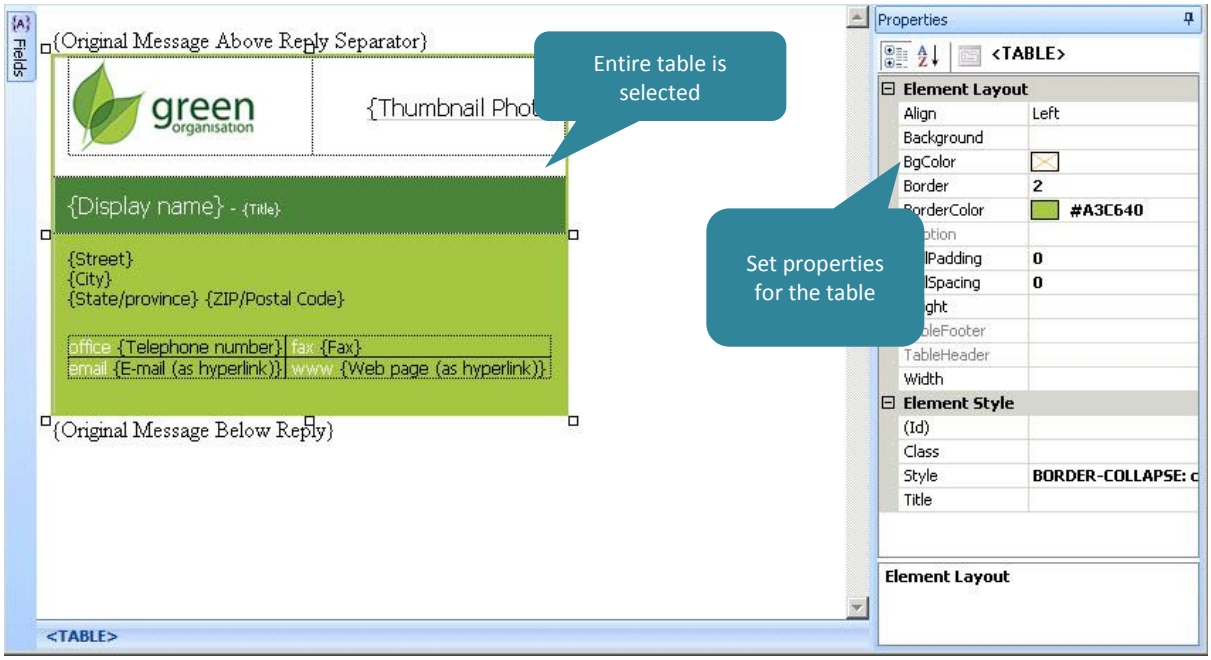


Table Properties



NOTE

In some instances, content can be updated using the properties pane, or by using toolbar options. For example, if you need to update the URL for a hyperlink, you can select the link in the content pane and either choose the **hyperlink** option from the toolbar - or you can just change the required property in the **properties pane**.

How To...

This section contains instructions for completing a selection of common tasks with templates, within Exclaimer Signature Manager Exchange Edition:

- How do I create a dynamic signature template? [pg.316]
- How do I suppress blank lines if fields are not populated? [pg.317]
- How do I create a contact block? [pg.319]
- How do I insert an image at the start of messages? [pg.322]
- How do I add a signature to the very end of email messages? [pg.324]
- How do I add a signature after the latest reply in an email conversation? [pg.326]
- How do I set the font for text in a template? [pg.328]

How Do I Create a Dynamic Signature Template?

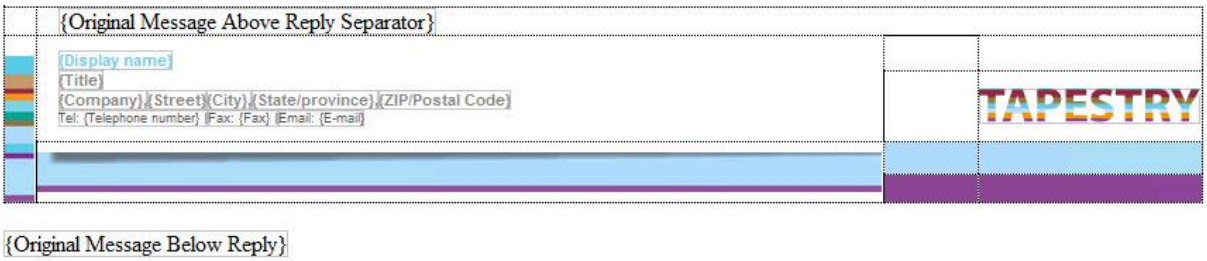
To create a dynamic signature template, simply create a new template and add message sender [pg.223] Active Directory fields in the required sequence and format. When working in HTML format, you can be as creative as you like with tables, images, shading, etc.

To help you get started, a number of custom designs are included with the Exclaimer Signature Manager Exchange Edition installation - an example is shown below.

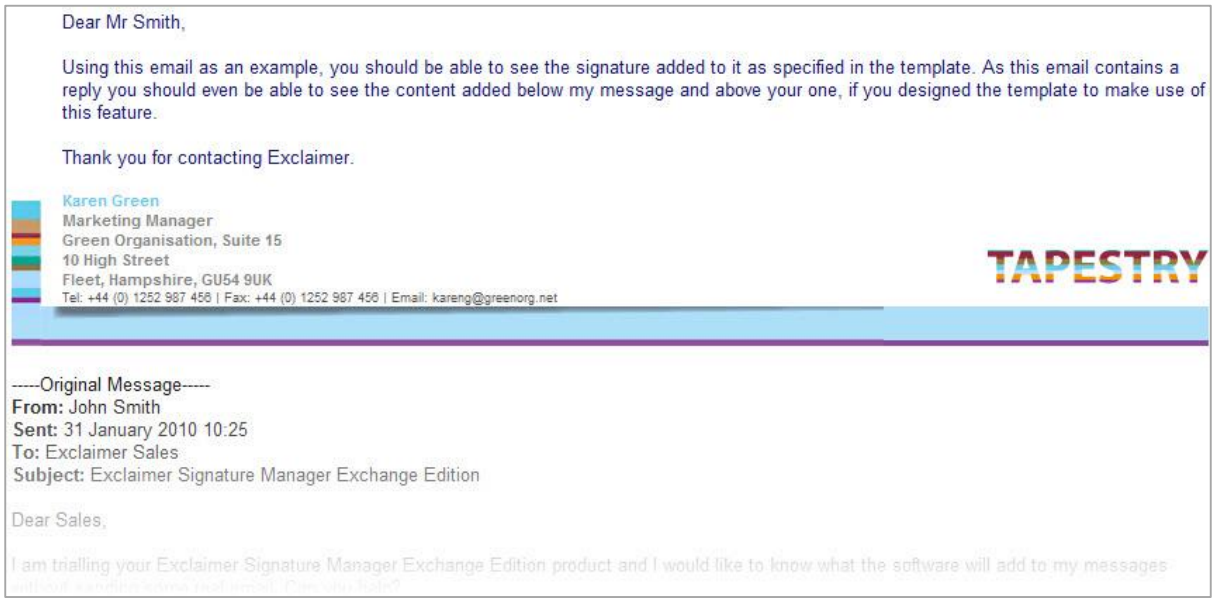
Tapestry signature business card example

In this example, a template has been designed in tabular (business card) form. Font attributes are set for certain fields to be displayed in blue and/or bold and images are also included within the table:

Design mode



Preview mode


Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
Karen Green
Marketing Manager
Green Organisation, Suite 15
10 High Street
Fleet, Hampshire, GU54 9UK
Tel: +44 (0) 1252 987 456 | Fax: +44 (0) 1252 987 456 | Email: kareng@greenorg.net
TAPESTRY
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Dear Sales,
I am trialling your Exclaimer Signature Manager Exchange Edition product and I would like to know what the software will add to my messages

How Do I Suppress Blank Lines If Fields Are Not Populated?

When using fields in templates, it is often useful to suppress an item if there is no data in the Active Directory to populate the field for a given user. There are a number of ways to suppress blank lines when defining templates - you can:

- Use a contact block [pg.317]
- Use a smart table [pg.317]
- Use a field prefix [pg.318]

Use a contact block

A contact block is a pre-defined set of fields, presented in tabular form. For example:

Tel:	{Telephone number}
Fax:	{Fax}
Mobile:	{Mobile}
Email:	{E-mail (as hyperlink)}

...produces:

Tel:	+44 (0) 1252 987 456
Fax:	+44 (0) 1252 987 456
Mobile:	+44 (0) 7733 102345
Email:	kareng@greenorg.net

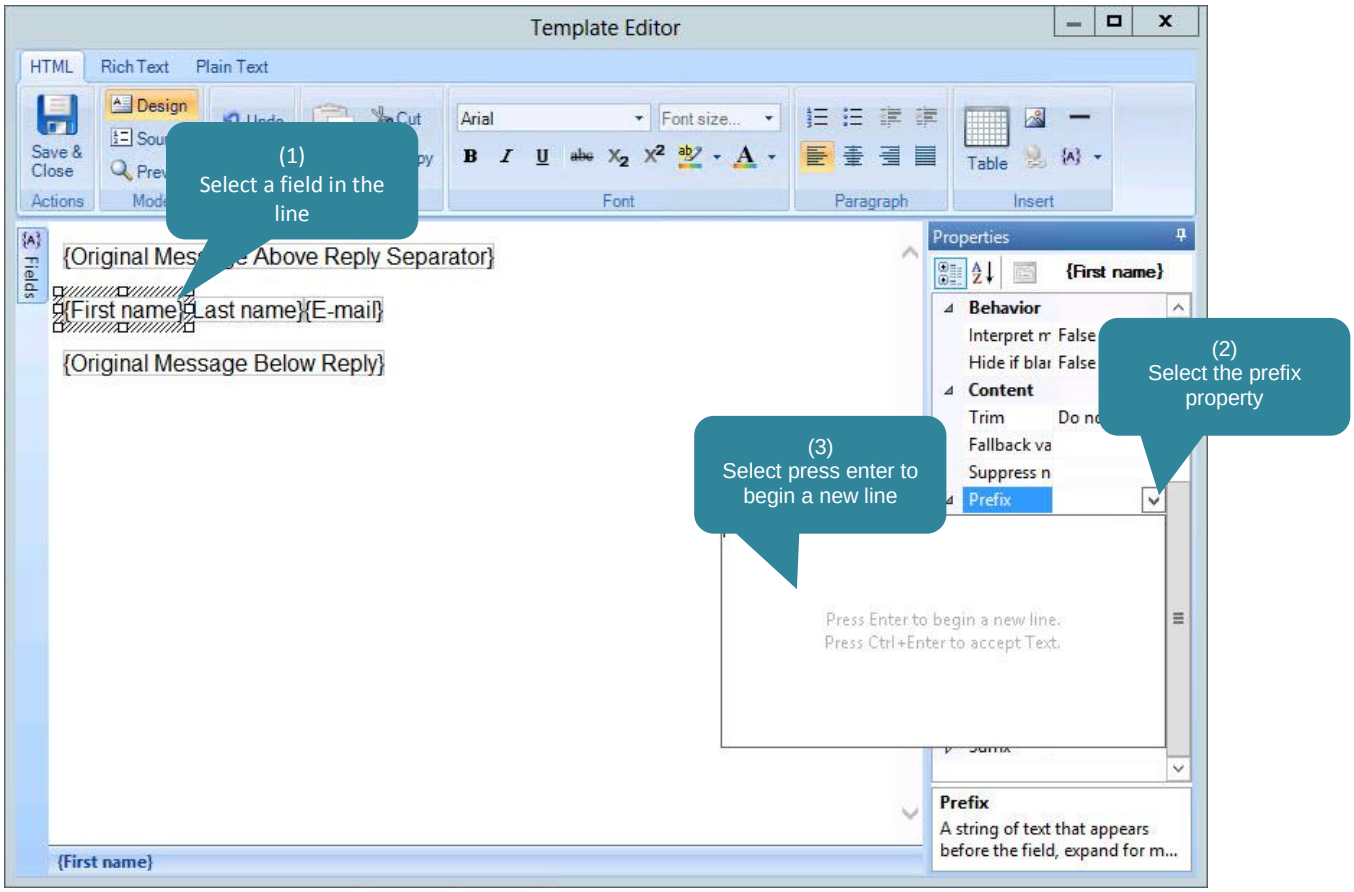
When a contact block is used, rows are not displayed if Active Directory data is not present. For further information please refer to message sender - general fields [pg.223]. Other 'block' fields (e.g. address block [pg.226] and personal block [pg.225]) work in the same way.

Use a Smart Table

The custom smart tables field can be used to insert Active Directory information in tabular form, with options to suppress rows if associated information is not present. For further information please refer to smart tables [pg.267].

Use a Field Prefix

An alternative approach is to place all required fields on a single line, but use the prefix property to insert a carriage return before each one (shown below):



How Do I Create a Contact Block?

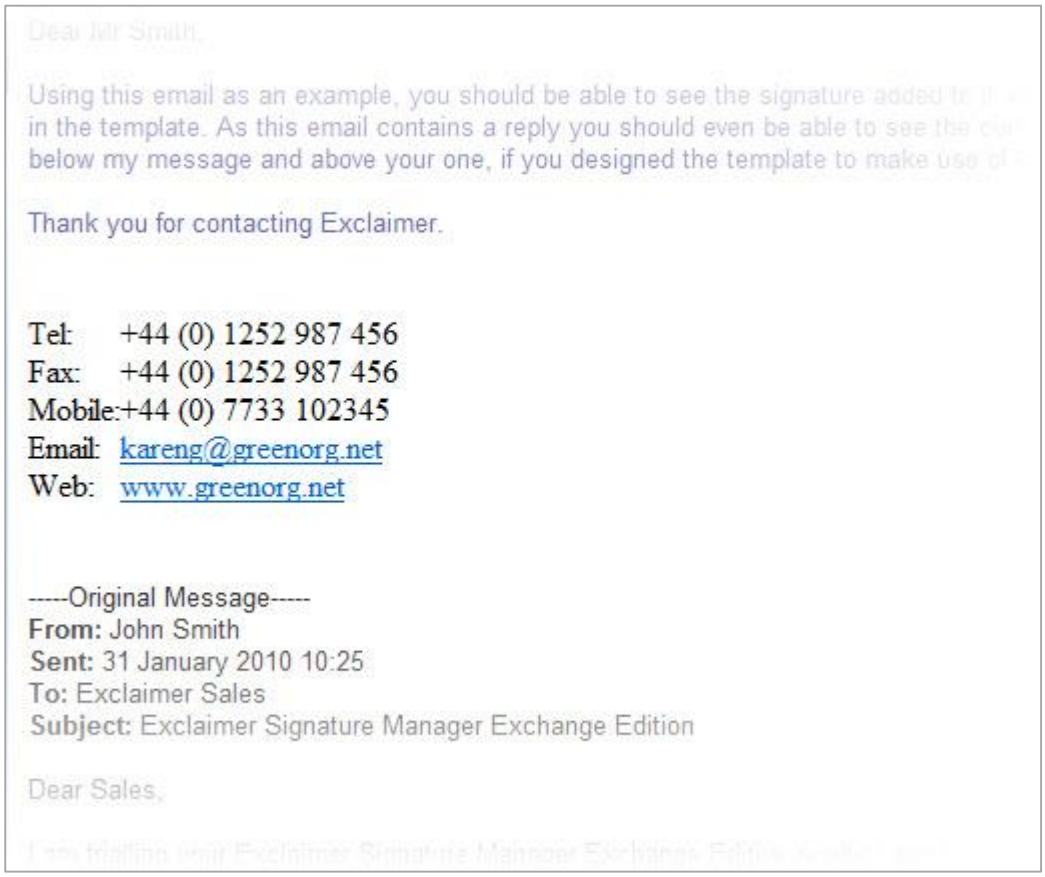
A contact block is a block of contact information for the sender which is presented in tabular form - for example:

{Original Message Above Reply Separator}

Tel:	{Telephone number}
Fax:	{Fax}
Mobile:	{Mobile}
Email:	{E-mail (as hyperlink)}
Web:	{Web page (as hyperlink)}

{Original Message Below Reply}

When email messages are processed, fields in the contact block are replaced with Active Directory details for the sender - for example:


Dear Mr Smith,

Using this email as an example, you should be able to see the signature added to it as in the template. As this email contains a reply you should even be able to see the contact below my message and above your one, if you designed the template to make use of it.

Thank you for contacting Exclaimer.

Tel: +44 (0) 1252 987 456
Fax: +44 (0) 1252 987 456
Mobile: +44 (0) 7733 102345
Email: kareng@greenorg.net
Web: www.greenorg.net

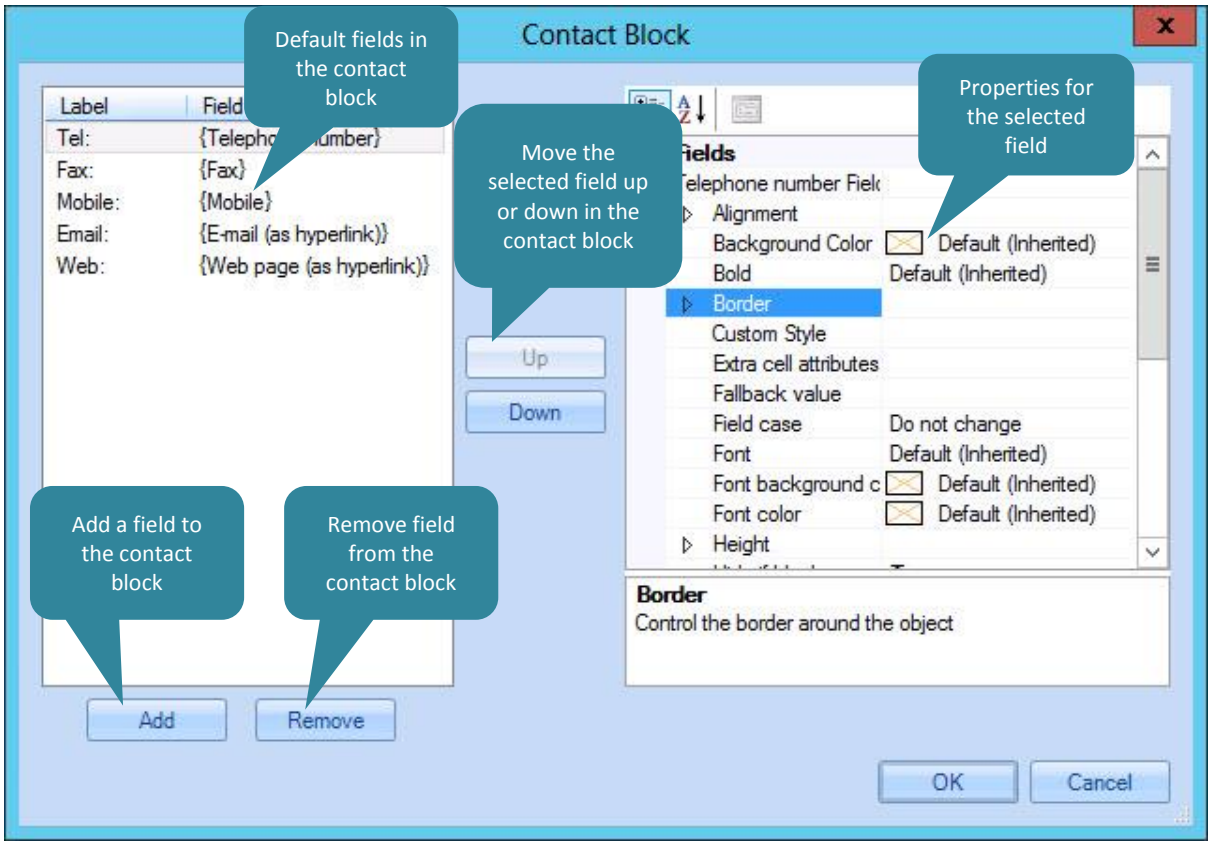
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition

Dear Sales,

I am trialling your Exclaimer Signature Manager Exchange Edition and I would like

How It Works

When the contact block field is added to a template, the contact block window is displayed. Here, default fields are included as a start point:



When a field is selected in the left-hand pane, its associated properties are displayed (and can be amended) in the right-hand pane. For further information, please refer to the properties [pg.309] section of this guide.

Adding Fields to a Contact Block

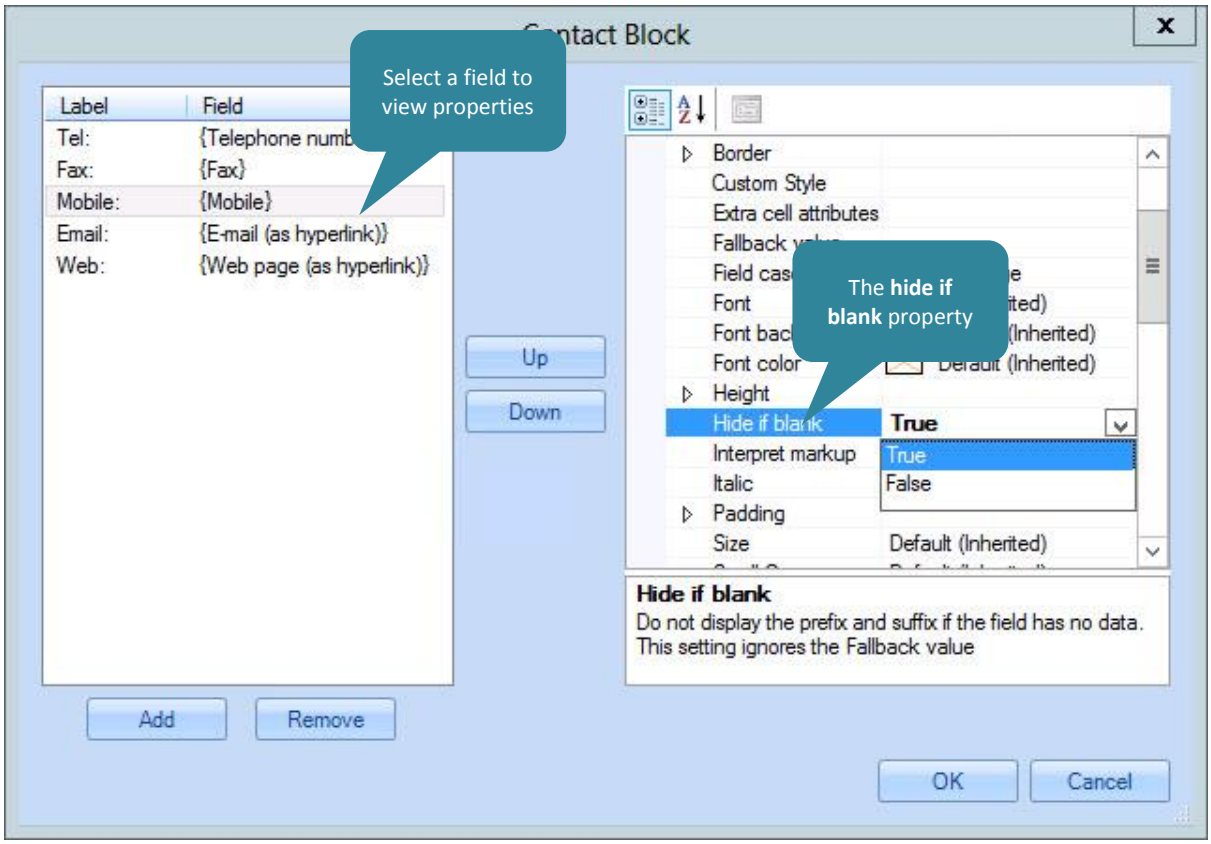
To add a field to the contact block, click the add button to display the add field window:

Simply enter the required label (i.e. the text to be displayed alongside this field (in design view and when the template is used in signatures) and choose the associated Active Directory field. Click OK to add the field to the bottom of the contact block and, if required, use up/down buttons to change its position.

A contact block can be arranged as required but a typical layout has a field label in the left column and the corresponding field in the right column.

Updating an Existing Contact Block

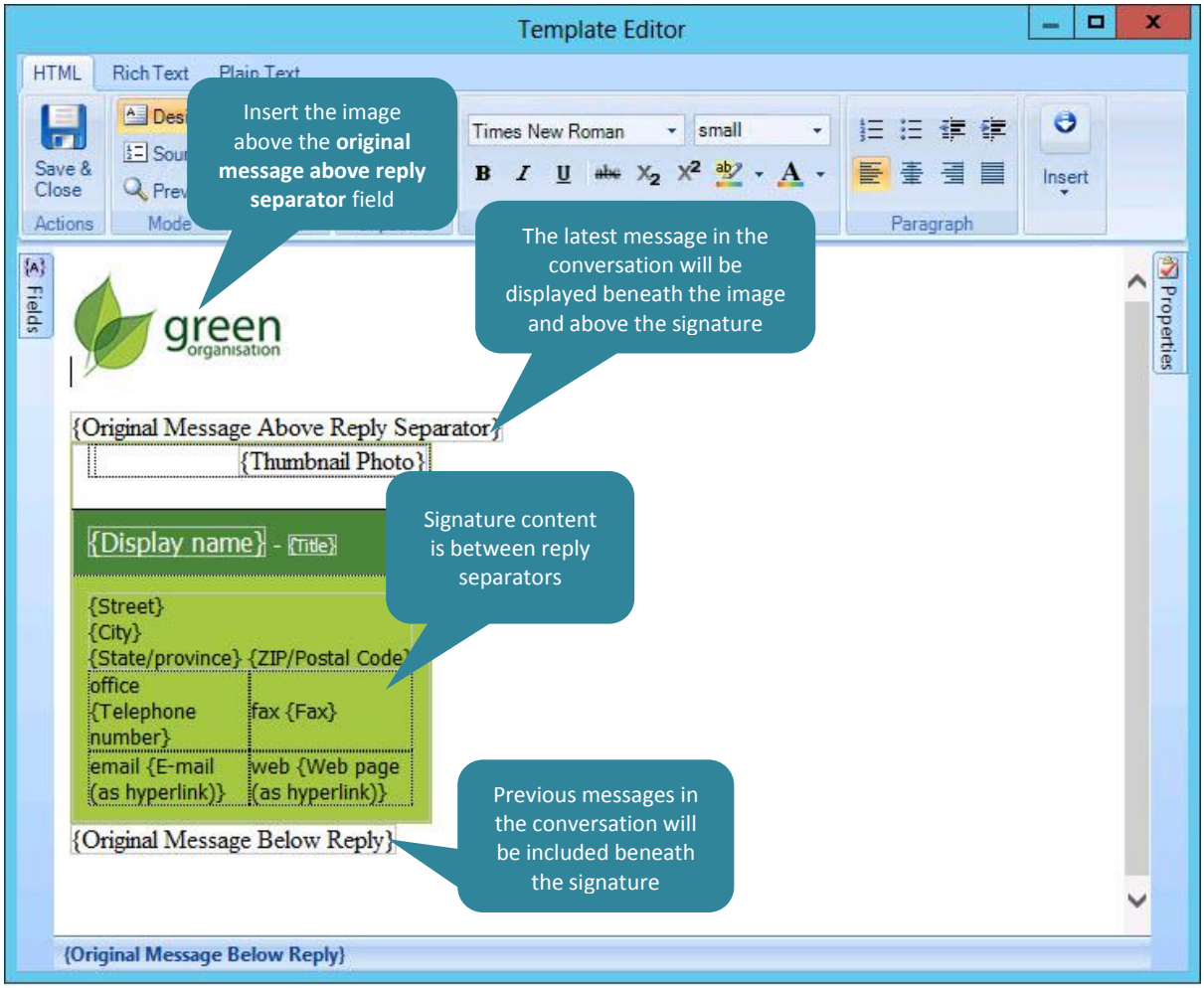
To update an existing contact block in a template, simply double-click anywhere inside the block to open the contact block window. Use this window to add/remove fields and update properties (you can select any field and set the hide if blank property to true if you wish to suppress this line for contacts where no information is present for the field):



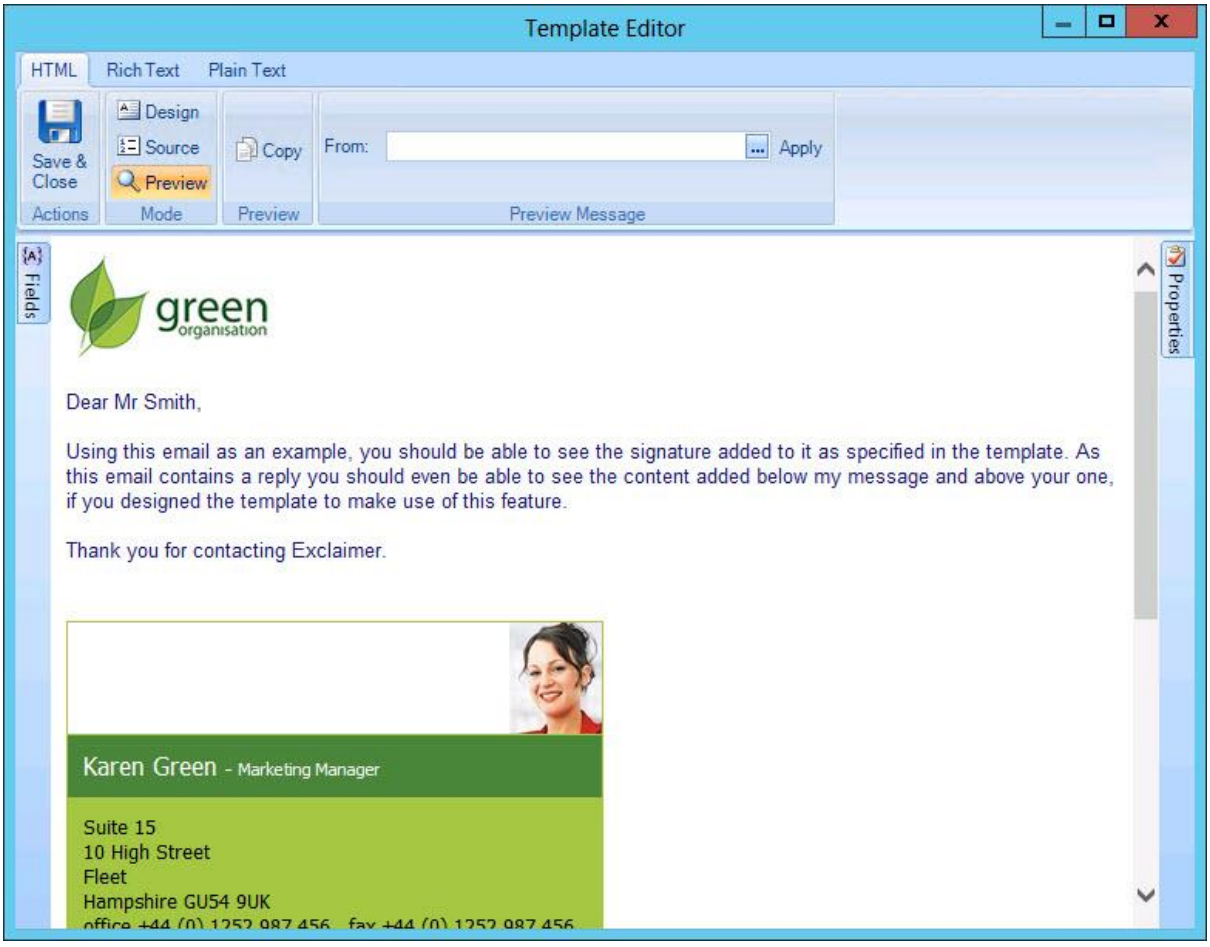
How do I Insert an Image at the Start of Messages?

To insert an image at the very start of email messages, simply insert the required image above all original message fields in the relevant template.

For example:



When this template is previewed, it is displayed as follows:


Template Editor
HTML
Rich Text
Plain Text
Design
Source
Preview
Save & Close
Actions
Mode
Copy
Preview
From:
Apply
Preview Message
Fields
Properties
green organisation
Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
Karen Green - Marketing Manager
Suite 15
10 High Street
Fleet
Hampshire GU54 9UK

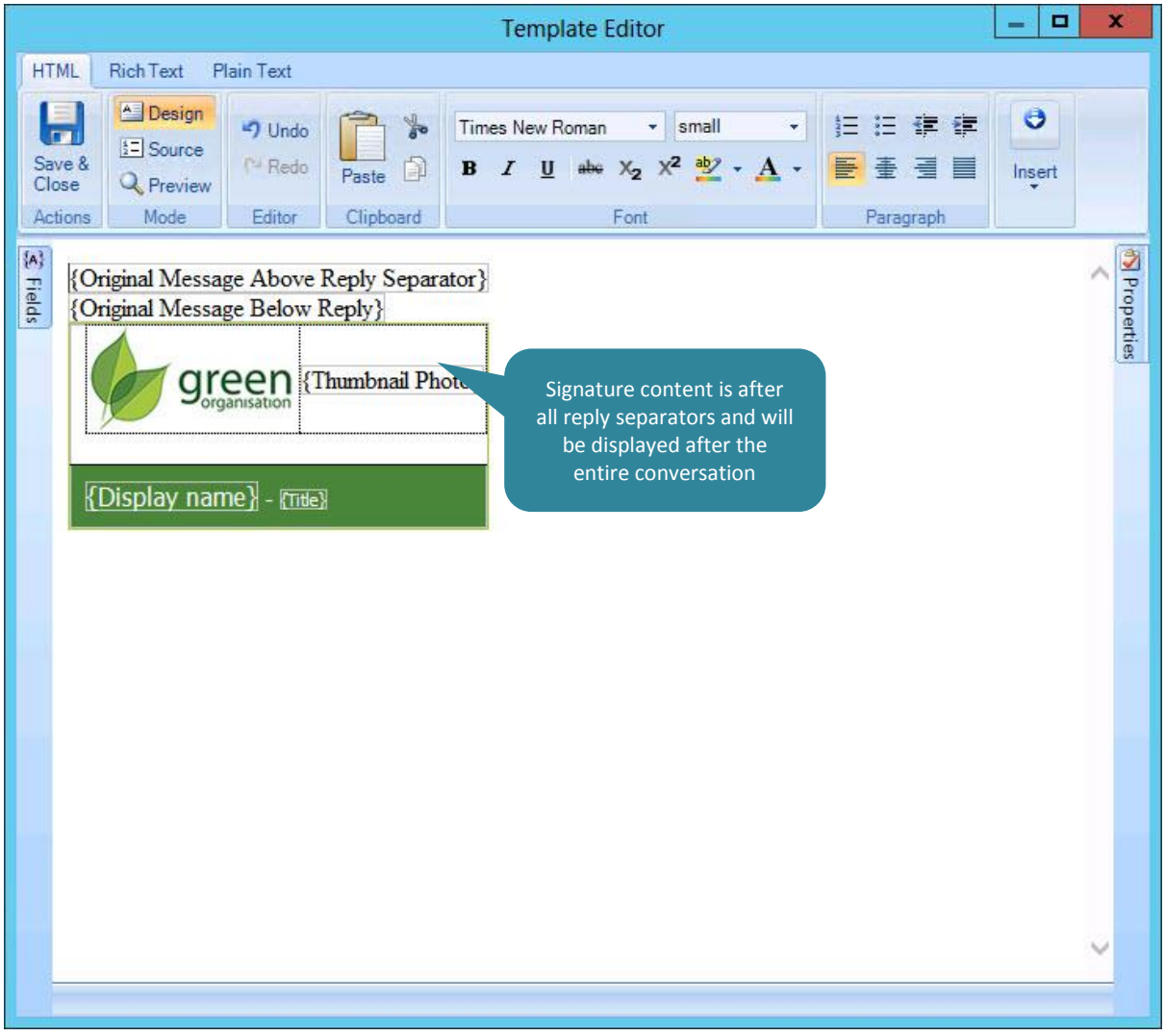
NOTE

If you have a selection of banner images, you can take this a step further and use the rotating banner ad [pg.246] field to switch between all images in a given folder.

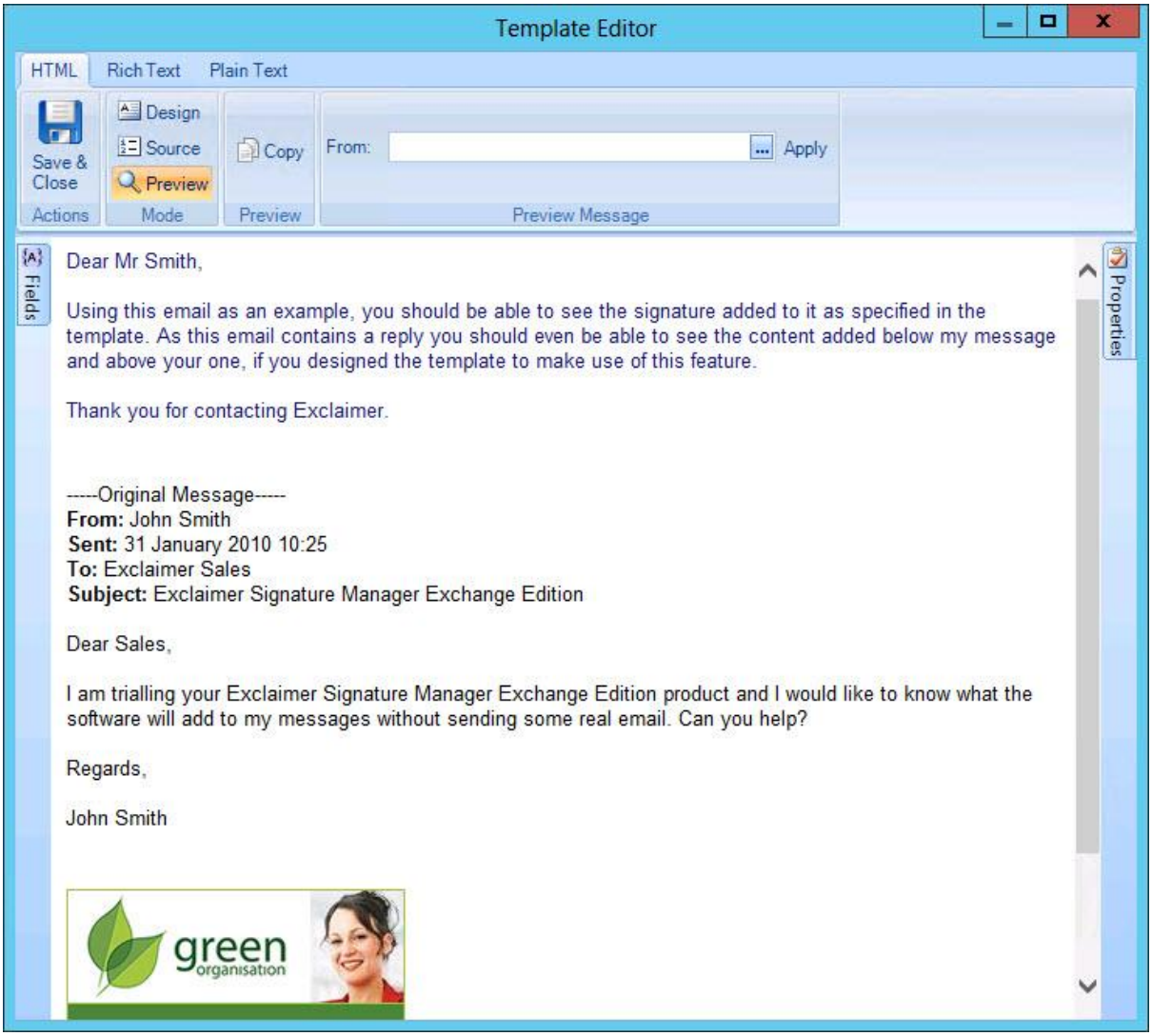
How do I Add a Signature to the Very End of Email Messages?

To place a signature at the very end of an email message, signature content should be placed below all original message fields in the template.

For example:



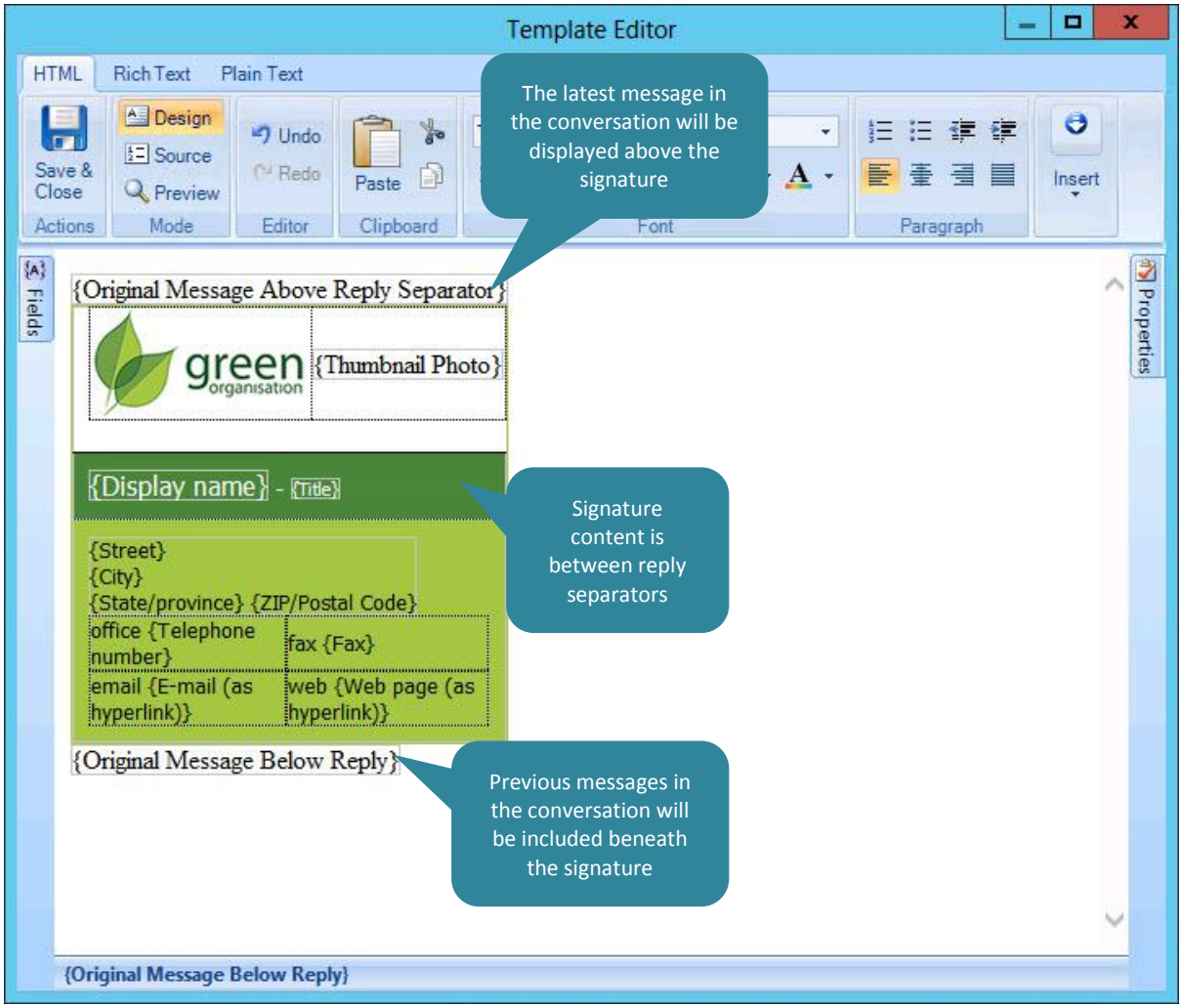
When this template is previewed, it is displayed as follows:


Template Editor
HTML
Rich Text
Plain Text
Save & Close
Actions
Design
Source
Preview
Mode
Copy
Preview
From:
Apply
Preview Message
Fields
Properties
Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition
Dear Sales,
I am trialling your Exclaimer Signature Manager Exchange Edition product and I would like to know what the software will add to my messages without sending some real email. Can you help?
Regards,
John Smith
green
organisation

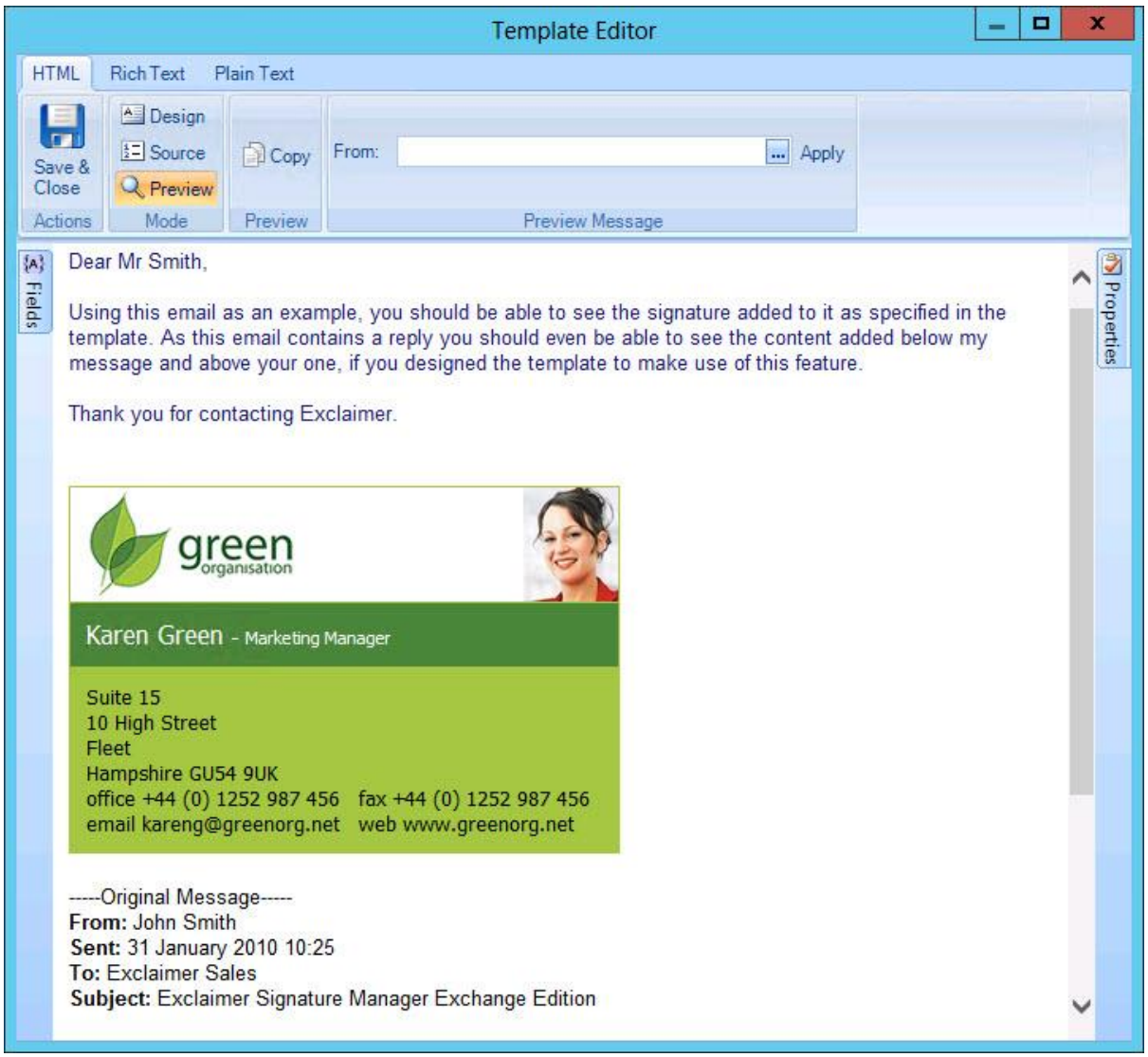
How Do I Add a Signature After the Latest Reply In An Email Conversation?

To place a signature below the latest message in an email conversation, content should be placed between {Original Message Above Reply Separator} and {Original Message Below Reply} fields in the template.

For example:

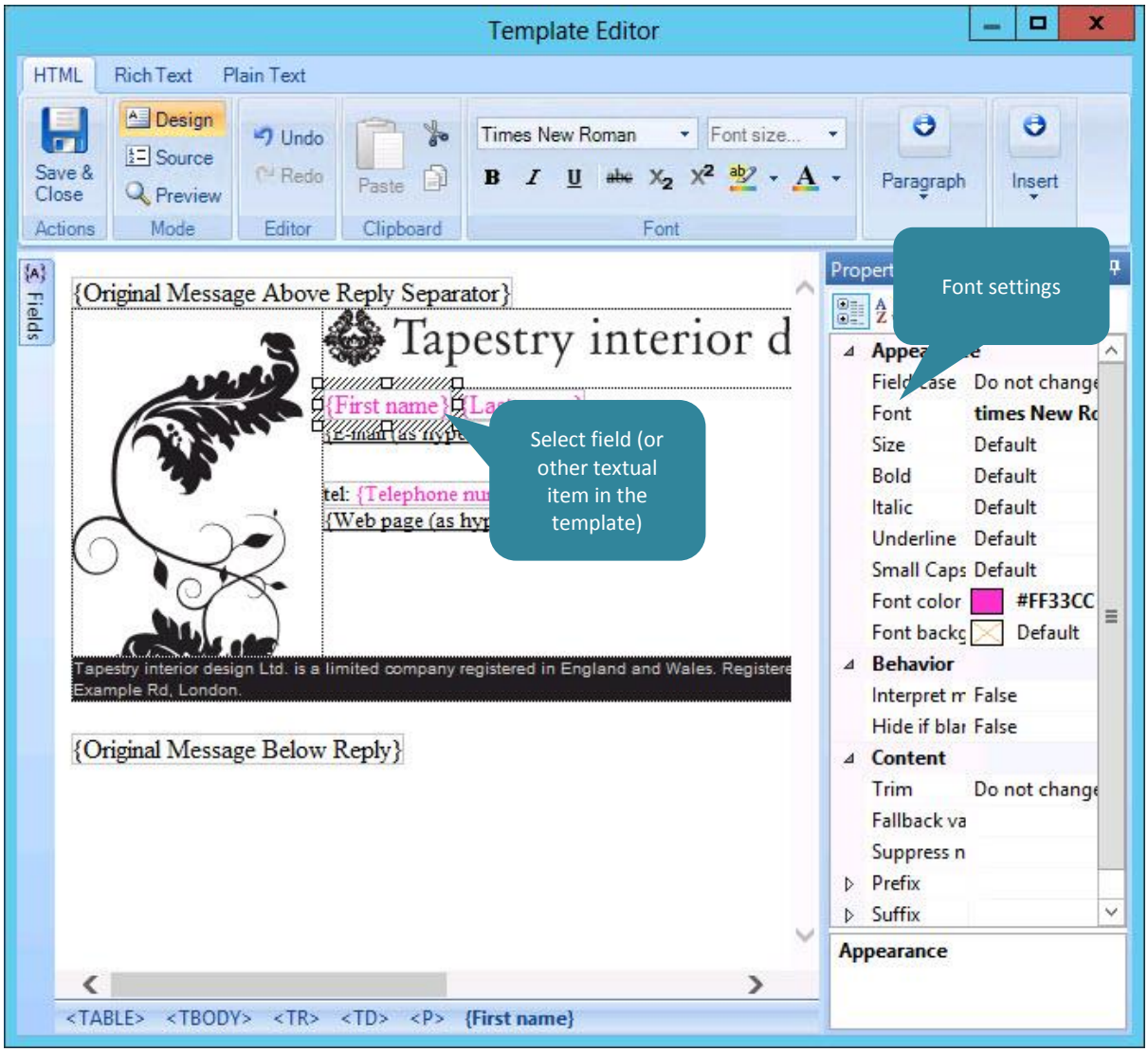


When this template is previewed, it is displayed as follows:


Template Editor
HTML
Rich Text
Plain Text
Design
Source
Preview
Save & Close
Actions
Mode
Copy
Preview
From:
Apply
Preview Message
Fields
Properties
Dear Mr Smith,
Using this email as an example, you should be able to see the signature added to it as specified in the template. As this email contains a reply you should even be able to see the content added below my message and above your one, if you designed the template to make use of this feature.
Thank you for contacting Exclaimer.
green organisation
Karen Green - Marketing Manager
Suite 15
10 High Street
Fleet
Hampshire GU54 9UK
office +44 (0) 1252 987 456 fax +44 (0) 1252 987 456
email kareng@greenorg.net web www.greenorg.net
-----Original Message-----
From: John Smith
Sent: 31 January 2010 10:25
To: Exclaimer Sales
Subject: Exclaimer Signature Manager Exchange Edition

How Do I Set the Font for Text In a Template?

To set the font (and any other formatting attributes) for field items in a template, select the required field and use appearance properties in the properties panel (shown below). You can also apply formatting via the template editor toolbar [pg.200].



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